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ABSTRACT

The study reported here involves six countries (Germany, Italy, Yugoslavia, United Kingdom, United States, and Sweden) and focuses on the ways in which those who are actively employed have access to opportunities to alternate education and training with their employment. The first chapter discusses the study structure and defines the field covered in the study. In chapter 2 the major issues are discussed, including the availability of information; educational leave, equity, and efficiency; and responsibility and control. Chapter 3 analyzes the data collected from firms in these countries where alternation between work and education was developed. This information, treated as case studies, is divided into five sections as follows: internal and external provision of educational leave, demand for leave, duration and distribution, evaluation, and the implications for career patterns. The last chapter on the relation between educational leave and broader social and labor market policies includes the following five sections: the parameters of educational leave--external constraints and internal factors; educational leave and the segmentation of the labor market; qualitative aspects--technological developments, work reorganization, and industrial democracy; the role of public authorities; and concluding comments. A list of the firms studied and the grid used as a framework for the case studies are appended. (EM)

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Centre for Educational Research and Innovation (CERI)

ED154117

ALTERNATION BETWEEN WORK AND EDUCATION

A STUDY OF EDUCATIONAL LEAVE OF ABSENCE AT ENTERPRISE LEVEL

U S DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION

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1978

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PREFACE

In 1973, OECD published 'Recurrent Education: A Strategy for Lifelong Learning'. * This report (which came to be known as the 'Clarifying Report') aimed at setting out a conceptual framework within which the plethora of ideas already circulating in this field could be organised and a basis for policy discussion established. It laid out the arguments for pursuing a strategy of recurrent education, and analysed some of its educational and social implications.

The next phase of OECD's work was geared to providing a report to the 9th Session of the Standing Conference of European Ministers of Education, which met in Stockholm in June 1975 with recurrent education as its main item for discussion. This report, published under the title 'Recurrent Education: Trends and Issues', ** restated the rationale for recurrent education, surveyed the existing situation in synoptic fashion, and presented an agenda for the future which, it was argued, would need to be tackled by any country seriously committed to promoting developments towards recurrent education. The bulk of the recommendations endorsed by the Ministers at the end of the Session were fully consonant with the proposals contained in the OECD report.

The Clarifying Report had already presented as one of its main themes the need to coordinate education and labour market policies in order to give adults a genuine possibility of taking up study again. The Ministers' Report took up this theme, both in its analysis of current developments and in its look into the future. At the level of the individual, the majority of learning opportunities for adults in many countries occur through their economic occupation and much could be done to broaden the scope of these opportunities. Moreover, whilst unreservedly rejecting the view that educational provision should be wholly subordinated to economic needs, the report pointed out that the general employment position was changing dramatically, and that it was likely that increasing emphasis would be laid on the potential of active manpower policies, including training of various types, for coping with this change.

Associated with these arguments was the emergence of paid educational leave as a serious issue at the bargaining table. The ILO Convention No. 140, passed in 1974, gave prominence to the fact that

* CERI/OECD, Paris, 1973.
** CERI/OECD, Paris, 1975.

some workers had already achieved the right to such leave and stimulated discussion, at international level and within the countries, on what the implications of an extension of the right would be. At the same time OECD began a study, published in 1976,* which analysed the situation in ten countries (Belgium, Denmark, France, Germany, Italy, Netherlands, Sweden, United Kingdom, Yugoslavia, United States). It described empirically the official provisions made for the taking of leave, dividing the countries into two basic groups: those where the individual possesses the right to take leave, subject only to organisational constraints, and those where leave is granted on the initiative of the employer. The report went on to outline some of the problems involved, such as the reaction of the public education system to the growth of educational leave, its financing, and its impact on industrial relations.

These, then, are the three major strands which form the background to the present study. They represent a progression from conceptual to more policy-oriented work. The study on paid leave dealt with a specific aspect, but like the other two reports treated the issue at the national level. Work at this level presents considerable difficulties, but the contours necessarily emerge as rather smooth. It was therefore decided to scrutinize the wrinkles more closely by looking at the implementation of educational leave within individual enterprises; the ride would be bumpier, but the exercise would complement the work carried out at national level by sharpening awareness of the concrete problems encountered in different countries and within different sectors. It was expected that some tensions would be revealed between national, enterprise and individual objectives, and that more light would be shed on the practical problems involved, as well as on the benefits emanating, and that at the end of the study OECD would be in a better position to formulate the questions which were most pressing.

J.R. Gass

Director
Centre for Educational Research
and Innovation

* Developments in Educational Leave of Absence, CERI/OECD, Paris, 1976.

I

INTRODUCTION

THE STRUCTURE OF THE STUDY

The study has no pretensions to statistical representativeness. It was carried out in six countries: Germany, Italy, Yugoslavia, United Kingdom, United States, Sweden. * The aim was to take a very small number of firms, ** covering both the private and the public sector, where alternation between work and education was relatively developed. They were treated more or less as case studies, but a degree of comparability was assured by two means. First, each was carried out on the basis of a common grid prepared by the Secretariat. This was not a questionnaire, but a framework within which the rapporteurs were asked to operate, being free to make appropriate emphases and to adapt their lines of enquiry. The grid is presented in Appendix 3 and a cursory glance will suffice to show that it was designed to accommodate as many options as possible, rather than to evoke full response to all the questions contained within it.

The second way of ensuring some comparability was to have at least one type of enterprise that was common to all the countries. It was assumed that it would be easier to achieve this in the public sector, and the Post Office was chosen. In the event, in neither Italy nor Yugoslavia was the Post Office a suitable candidate (hospitals being substituted in Italy, and the railways in Yugoslavia, though in the latter case the public/private distinction is anyway invalid), but a fair degree of comparability was instead achieved by having a number of 'sub-sets': chemical firms in the UK and Germany, for instance, or hospitals in Italy and the US. In any case, however, the point to be stressed is that we were not looking to draw any firm conclusions about any particular country or economic sector - the preference for equivalent enterprises was merely to avoid total heterogeneity.

* The Swedish report formed part of a wider national study; like the others, it involved a number of firms, but the report did not deal with them individually. For this reason, the material included from Sweden, when it does not refer to the national position, is still of a more general nature.

** The terms 'enterprise', 'company' and 'form' are used loosely and interchangeably.

One further aspect is sufficient to demonstrate the unrepresentative character of the study as far as statistically-based generalisations are concerned. Most of the firms studied were large ones, and the rest were medium-sized. None was small. This in itself is highly significant and will be discussed later, but for the moment it simply underlines that the aim of the study was to provide insights into the way educational leave functions; as its incidence is mainly concentrated in the larger firms, it is they that are covered. A list of the enterprises is provided in Appendix 1, and of the rapporteurs in Appendix 2.

The grid (Appendix 3) was constructed around three phases in the leave process: the departure from work, the study period itself, and the return to work. Rapporteurs were asked to discuss with employers, unions and relevant public authorities the problems and benefits that arise at each stage, the grid containing a broad array of issues from which they should be able to select certain ones as being more pertinent than others to the case in hand. The interviews were then completed and the country reports written. On this basis the Secretariat has compiled a synthesis of the empirical and analytical material included in the reports, and linked it to a broader discussion of the functioning of the labour market and the way that relates to education and training. The report takes into account the views expressed by the rapporteurs on these issues, but it is not to be interpreted as a group report or as necessarily representing their individual positions. It is an attempt to single out and describe developments in the field of educational leave taking place in enterprises in different countries, and to bring to the fore the most urgent questions that currently confront those who take part in policy-making both at enterprise and national level.

THE FIELD DEFINED

An investigation of the education and training available to enterprise employees immediately comes across a major stumbling block: that of classification. There is such diversity, even within a single country, that the construction of a clear-cut typology is more likely to confuse than to clarify under present circumstances, and when the investigation covers several countries the difficulties are as usual compounded. As described in the Background, this study was conceived of as a follow-up to the survey on educational leave, but as soon as one gets away from written legislative measures or negotiated agreements, the edges of the subject become blurred and shade away into other types of provision that could hardly be called 'educational leave'. For this reason, although educational leave remains at the centre of the study, the notion of alternation has been chosen, allowing as it does the inclusion of those measures that could not strictly be classified as providing educational leave but are nevertheless sufficiently relevant that it would be culpably pedantic to exclude them.

However, the notion of alternation between work and education can cover a huge range of activities - indeed, in its broadest sense it

includes all education that follows the termination of the initial phase of education, together with some initial education that incorporates periods of work experience. But recurrent education is basically concerned with the possibilities for adults to take up study again after they have finished their period of initial education, and for this reason (as well as making the study manageable in scope) two major areas were excluded as far as was possible. Apprenticeship systems were not considered, in that they may be considered as part of initial education, albeit a transitional one. And straight on-the-job training, where the learning takes place with the employee remaining at his working position, was also ignored. Even so, the line between these and some of the training provision covered in the study is at times a fuzzy one.

On the other part, a basic point that emerged during the course of the study was the need to reflect matters more accurately by broadening still further the notion of alternation between work and education to include periods of unemployment and underemployment. In other words, instead of envisaging a pattern of alternating phases of work and education (however thin or thick the respective phases might be), it would for the purposes of an overall picture be more realistic to make room for the possibility of intervening periods during which the individual has no occupation, or holds a position (whether out of choice or not) which is less than full-time. Such a pattern, of course, could only be discerned by taking a more elevated viewpoint than that at enterprise level, but it is particularly relevant to the discussion in Chapter IV of the relation of alternation to labour market segmentation.

The kernel of the study is therefore educational leave, but we have not attempted to treat it as a phenomenon with a clearly definable identity by severing its connections with the broader field of training provision. The essence of educational leave is that it should involve the reduction of some or all of an employed person's working time in order to allow him or her to pursue further study.

One preliminary point that needs to be cleared up is whether or not the leave entails subsequent return to the same enterprise. Strictly speaking, the term 'leave' implies that the beneficiary will indeed take up employment with the same enterprise once his period of leave is over, and indeed this is often a serious bargaining point since workers' representatives are generally concerned to maintain both security and seniority rights. However, a scheme based on common funding, attributing a general right to leave and aiming at the promotion of labour mobility and flexibility may well envisage that many of its participants will change jobs, and may in fact recognize and encourage this by combining the educational provision with counselling and placement services. In other words, the 'leave' is from employment rather than from a specific enterprise. The distinction between this and the unemployed who regain employment following a training period is that those participating in these educational leave schemes do so voluntarily and as a reasonably planned move, rather than as a consequence of events

beyond their control. This is not to deny the obvious point that even when the right to leave is taken up 'voluntarily' in the common sense of the word it may be as a result of broader economic trends the worker is powerless to influence, and as a consequence of which he decides to launch himself in a new direction; what is crucial is the element of anticipation of events, which at least enables him to have some prior idea of how he will organise his future. But for the purposes of this study it is more appropriate to confine the educational leave category to those who return to the same enterprise, and restrict oneself to drawing a distinction between the type of alternation which ends up with the worker doing the same job as before, and that which results in a promotion or a change of some other sort in his position within the enterprise. If this approach is adopted, all training that leads to an immediate change of employer would fall into a separate category, even if it had been taken under the same set of arrangements that granted regular educational leave.

There are several - not necessarily exclusive - approaches to the classification of educational leave. First, and perhaps most fundamentally, there is the issue of whether the worker has the right to take leave, subject only to considerations of administrative feasibility and leaving aside the question of financial support, or whether the leave depends on the employer granting permission. The ILO Convention naturally urges that progress should be made towards the establishment of a right to leave, but to restrict the notion to that at present would exclude many instances where workers are in fact released for greater or lesser periods of time.

Secondly, there is the nature of the leave. The ILO Convention suggests a tripartite distinction between general, vocational and trade union education and this may be adopted as a point of departure, but it is often difficult to disentangle the first two from each other (a point to which we shall revert), and even the precise limits of the third are on occasion a matter for dispute. Clearly the allocation between the three types will vary according to who controls access to the leave and who finances it. As things stand, employers are unlikely to be willing to support to any great extent leave for general education, and it may therefore be inferred that access to general educational opportunities depends upon the extension of the individual's right, but this is probably to lay too much weight on the distinction and is again unnecessarily restrictive for the purposes of analysis.

The distinction is nevertheless important from the point of view of equity; for when training is defined as vocational if it is relevant to the individual's current or immediately foreseeable occupational position, its scope will broaden according to the interest of the job, with the consequence that those who already occupy the most interesting positions will be able to benefit from a far wider range of opportunities than the unskilled workers in dead-end jobs. Not only will the training provision be more varied in content, it is also likely to be longer simply in terms

of time, since the skills to be acquired are of relatively greater complexity and hence justify a longer leave.

The conventional conception of the distinction between vocational and non-conventional education is inadequate in that it tends to attempt a degree of universality that ignores the differences in the occupational content of the individual job. The distinction must obviously be maintained in one form or another, but if it is not to have a strongly regressive impact on the distribution of educational opportunities and career prospects, its relation to existing occupational differences must be taken into any consideration of entitlement to leave of absence.

A third aspect is the way in which the leave is taken. In this respect, schemes fall between two poles: on the one hand 'extended' leave of absence, which enables the worker to leave his job to study full-time for a substantial period, and on the other 'restricted' leave where the worker does not quit his job but receives 'on-the-clock' (though not on-the-job) training which may take only a few days part-time study. In a sense it is the sandwich (extended) versus the mille-feuilles (restricted), except that the sandwich may not be symmetrical (e.g. if the leave is followed by promotion or job change) and the mille-feuilles is not likely to be a creamy luxury but sternly practical. Welcome though it would be to concentrate on the former, it is clear from the case studies and other evidence that most current leave schemes are much closer to the second pole even in countries (Sweden, Italy) where the worker possesses the right to take leave. So although in this study we deal mainly with restricted leave, this is not because we regard it as a fully-fledged form of alternation between work and education, but because policies are much more developed in this area and hence provide a richer source for investigation. A key issue for the future will be the degree to which the right to extended leave will spread, or whether educational opportunities for workers will continue to be confined to restricted leave.

This distinction raises a number of other issues which we refer to later: the difference in objectives, restricted leave being based very much on grounds of pure economic efficiency, whereas extended leave - at least potentially - can be used more for individual development and for the achievement of greater equity; the methods of financing the leave, with restricted leave generally being entirely financed by the enterprise, whereas extended leave may involve support from the public and/or sacrifice on the part of the individual; the role of the formal education system, which is much less significant for restricted leave; and finally the issue of control, with restricted leave very much employer-dominated, even if unions are consulted, whereas extended leave may raise questions about the distribution of power, not only over the education but over the enterprise as a whole.

None of the countries provides extended leave to any significant degree. If one uses the first two parameters, however (right to leave and the nature of the study), one can roughly divide the countries studied

into two groups, although as usual the fits are very loose. Sweden and Italy are on one side, in that the right to leave exists there, which implies also greater access to more general education; on the other side there are Germany, the UK and the US, where control lies in the hands of the employers. Yugoslavia is something of a hybrid: in principle the worker has the right, but this is subject to the decision of the self-governing economic unit, and leave for purely personal ends is unlikely to be granted. The roughness of the grouping should, however, be stressed, particularly since even those who have the individual right to leave often choose to exploit if for vocational purposes.

Such, then, is the field covered in this study. Other forms of alternation exist which it has not been possible to examine, but which should nevertheless be mentioned. Most obviously, there are all those types of educational provision (such as correspondence courses, television and radio programmes, evening classes and so on*) which are available to workers in their spare time. Usually this means the evening or the weekend, with minimal provision being made for those who work anti-social hours. The distinguishing feature here is that the education is undertaken in addition to the employment; in a sense the alternation process becomes more condensed, since (depending, obviously, on the time devoted) the individual is choosing to reduce his free time and to substitute education for it, rather than having successive periods with free time alternating first with work, then with education, and then with work again. On occasion, there is an intimate link between enrolment in this type of course and educational leave, as when the worker's readiness to devote a certain amount of free time to study is rewarded by the granting of a complementary leave of absence, the hours spent in spare-time study being matched with one-for-one or by some other formula,** but this survey deals only with arrangements made within the enterprise and we therefore deal with this type of provision only when it has some direct relevance.

Forming a broader backcloth is the pattern to which reference has already been made, where periods of unemployment and underemployment are also regarded as phases in the alternation process. Examples here are unemployed people who undergo retraining in order to re-enter the active labour force, and women who interrupt their career in order to bring up children; there are also those who for personal reasons such as domestic upheaval decide to break for a while with conventional career patterns by taking a less strenuous job. The need to cater for all these categories lies at the heart of the overall case for recurrent education, and is discussed in OECD's publications on that broader concept. Whilst, therefore, it is extremely pertinent to point out that educational leave on its own constitutes only one element in a strategy

* See Comprehensive Policies for Adult Education, OECD, Paris, 1976

** Such systems operate, for example, in Belgium and Italy. See Developments in Educational Leave of Absence, CERI/OECD, Paris, 1976.

of recurrent education, and if not accompanied by complementary measures runs the risk of favouring those actively in the labour force at the expense of those outside it,* it would be redundant to expand the notion of alternation employed in the present study so far beyond educational leave that it covered all the issues that fall under the recurrent education rubric.

In sum, without wholly ignoring the wider issues, we have attempted to keep our attention focused specifically on the ways in which those who are actively employed have access to opportunities to alternate education and training with their employment. Even this relatively narrow approach has proved a fecund source of thorny issues of various sizes; some of these are raised directly by the case studies, some are more inferred, but it would be as well to outline the principal ones before analysing the empirical results gleaned by the rapporteurs.

* See page 72.

II

MAJOR ISSUES

Chapter III contains an empirical analysis of the case studies, and Chapter IV a discussion of the relation between educational leave and broader social and labour market policies. The issues raised below will crop up at various points during those two chapters; they are sketched out in order for the reader to be able to bear them in mind throughout the various sections, when explicit reference will not necessarily be made to them.

1. AVAILABILITY OF INFORMATION

We have already made it clear that the information in this study has of necessity been assembled on a rather piecemeal basis, with some seams proving richer than others and therefore being more extensively mined. But the argument under this heading goes well beyond the standard plea for improved data collection. It is, of course, true that anyone tackling adult education issues is very rapidly made aware of the motley character of the statistical picture, especially if employment-linked education is also considered. But the essential point is that in the corner of the field covered by this study there are more interesting reasons for the poverty of data than the mere fact that no-one has invested the time necessary to assemble the relevant facts.

However, this fact is in itself significant. Enterprises generally have no very clear idea of how much the education of their workforce costs them in real terms, despite an awareness that the sums involved are considerable. Calculation of real costs is admittedly a technically difficult operation, since indirect costs constitute an important but elusive factor, but even direct costs appeared in many cases to be assessed only roughly and judgment of the value of a firm's educational effort is made correspondingly difficult.

Indeed, it could be argued that one of the most important initial benefits of legislative or regulatory initiatives in education and training is that it stimulates companies to review their expenditure in this area, and this in turn may lead them to a better formulation of policy. In the UK, for instance, the 1964 Industrial Training Act resulted in much useful information being compiled for the first time, and it was only after the setting up of the National Commission on Vocational Training that many German firms became truly cost-conscious. So interest and information tend to be generated simultaneously.

There can be other reasons for improving information sources than a desire to be better placed to evaluate enterprise training policies. The spread of schemes providing incentives for the employment and training of various groups (young people, for example) means that there is more commonly than before a financial interest in monitoring the situation: for the enterprise in deriving the maximum benefit, and for the public authorities in preventing abuse and judging effectiveness. Revealing training costs can also have a slightly ambiguous effect on the volume of expenditure: it may stimulate further effort, but greater awareness of the sums involved could equally lead to economy-minded appraisal. It was suggested, in one of the enterprises studied, that those responsible for training were not keen to have a detailed costing carried out, since they feared that publication of the real expenditure would result in a cut in their budget - a cut which might not be justified, but against which their defence would be weakened. On the other hand, a firm that wishes to reinforce the progressive colour of its public image by demonstrating the relative generosity of its training provision will, in its computations, include items and employ techniques that yield the highest figures. In short, data are often not comparable for reasons other than that no time has been found to compile them.

It is not only a question of costs. Equally if not more significant from a policy point of view are the implications for the distribution of educational opportunities. In the first place, small enterprises are not only inherently less able to provide training (organisationally and financially they encounter greater difficulties); they are also badly placed to acquire the information necessary to formulate an effective training policy. Analyses of future skill requirements, for example, absorb resources which cannot be easily spared, even if the firms are in a position subsequently to provide the necessary training. But whatever the size of the enterprise there is a general lack of information on the distribution of educational opportunity among different employee groups. This is most starkly apparent in the absence of a breakdown according to sex, so that although there is widespread agreement on the fact that women are relatively disadvantaged it is often difficult to get a clear picture of that disadvantage - presumably an important condition if one wishes to restore the balance.

Similarly, it was reported that in more than one country where immigrants figure in significant numbers there was not even a mention of them as a separate category. Of course, some effort is being made to help immigrants, for example, through special language courses,* but the paucity of precise information is both a reflection of the inadequacy of educational provision and a factor in perpetuating that inadequacy. Breakdowns of participation in training are most common by level of worker, but even then they often ignore factors such as the

* In Sweden, each immigrant worker has the right to 240 hours' leave for language education.

length and expensiveness of the different courses, which are necessary if one is to have a comprehensive picture of the distribution of training.

Finally, however, the costs of collecting the requisite information should not be forgotten. This requires no elaboration, except that both employers and unions are being charged with an increasing number of tasks and often have difficulty in finding the manpower necessary to cope. It is worth remarking, therefore, that the collection and dissemination of information should, like many other functions, be carried out in a coordinated and rationalized way.

2. EDUCATIONAL LEAVE, EQUITY AND EFFICIENCY

Chapter I made it clear that the majority of educational leave exists for predominantly if not exclusively vocational ends, and that in particular leave that can be termed 'restricted' is geared primarily to the economic needs of the enterprise, even if it incidentally also benefits the individual. In other words, the basic objective is the efficient functioning of the enterprise. The last section, moreover, argued that there is a lack of information on the way different categories benefit from educational leave and this can be seen as a reflection of a basic indifference at enterprise level to the needs of disadvantaged groups. This is by no means true in every case, and the question of to what extent individual employers can be expected to take the initiative in promoting social objectives is considered in the next section on division of responsibilities; in this section, we discuss the relation between the objectives of economic efficiency and social equity, and identify certain groups who are particularly concerned.

Conventionally, the two objectives are counterposed, in the sense that emphasis on one is assumed to impede progress towards the other. An example often cited is that of the unskilled worker: from the firm's point of view, it is more rational to invest in training for workers who have already shown themselves capable of acquiring new skills and conforming to company norms.* But the zero-sum approach - what you gain on the efficiency swings, you lose on the equity roundabout - is misleading and myopic. It is nearest the truth when the issue is considered in a short-term perspective and in the limited context of the single economic unit. But whilst for an individual enterprise it may be economically rational to develop further the skills of a small number of workers, whose enhanced productivity will justify such an investment of training resources, the possible side-effects of such a policy (for example, a reduction in the volume of employment) rarely figure on that single unit's balance sheet, but are instead felt by society (to take the same example, in the form of the economic and social costs

* For the argument that investment in training is effectively not worthwhile for certain groups, see L. Thurow, Redistributional Aspects of Manpower Training Programs, in Manpower Programs in the Policy Mix, ed. Ulman.

of aggravated unemployment). Thus the apparent efficiency of providing training opportunities only for those who have already shown themselves capable of profiting is considerably reduced if one takes into consideration the wider consequences of further depressing the position of the unskilled: simplistically, one might say that the costs of treating the problems thus created absorb the increased wealth thus generated. The opposition of efficiency to equity is frequently misleading - often enough, at any rate, to need careful scrutiny when used as justification for any policy proposal.

Clearly the issues raised in the last paragraph go far beyond the scope of this study, and the brevity of the argument can only increase its tendentiousness. Its basic thrust is that judgement of the efficiency of a policy depends on a variety of factors such as the time-span allowed for the effect, and the number of people who are regarded as affected by it: the longer the time-span and the broader the constituency the more difficult it is to ignore considerations such as that of equity. However, the fact remains that firms have pragmatic decisions to take, and - subject to public incentives and constraints, to union pressure and to their own inclinations towards benevolence - they make those decisions on the basis of what they consider to be in their own economic interest, and not that of particular sections of their workforce or of society as a whole. Just as the opening up of general recurrent education opportunities runs the risk of accentuating inequalities if positive countermeasures are not taken, so the expansion of educational leave may do nothing, or less than nothing, to improve the position of certain groups. We therefore turn to these groups in order to specify very briefly the obstacles that may prevent them from benefiting from educational leave.

a) The unskilled

The current distribution of educational leave opportunities does not seem to be straightforwardly regressive, in that there is no perfect relation between position in the occupational hierarchy and access to training. It appears, for instance in Germany, Italy and the UK, that middle level employees such as skilled craftsmen, are generally favoured as much if not more than those above them. It is, however, evident that even if the relation does not obtain at all levels those who are least qualified have the most restricted access to further educational provision.

To some extent, this category subsumes other disadvantaged groups, whose difficulties arise precisely from their lack of skill, and hence it is more instructive to look directly at those other groups. But there is one particularly important point to be made in relation to the unskilled as a whole: technological developments have raised the demand for skills in some sectors, it is true, but the counterpart to this has been the deskilling of other occupations, or their quantitative diminution. In other words, whilst part of the rationale for recurrent

education is rightly phrased in terms of 'the need to equip the workforce with new skills', the workforce is not homogeneous, and the trend is for a limited number of workers to develop these new and more sophisticated skills, and for much larger numbers either to be confronted with jobs emptied of their original skill content or to be rendered unemployed. The implications of this trend are discussed in Chapter IV.

One further specific problem should be mentioned. Unskilled workers tend to have a higher turnover rate, and the requirement of a certain length of service* as a condition of the right to leave tends therefore to exclude them from acquiring the right - or, where the right does not exist, from establishing a reasonable claim to be granted time off. The same problem - lack of entitlements due to short employment spells - affects the youth population.

b) Women

The obstacles that impede women from taking educational leave are mainly those that debar them in general from equal access to careers and status. Just as a prospective employer justifies his decision to appoint a man with the argument that a woman will leave to marry and have children, so selection for training is affected by the calculation that the enterprise is less likely to see a return over a number of years to investment in women. At the other end of the child-rearing period, women have often passed the age considered most suitable for further training. Overall, it is the age-group 25-35 who participate most strongly, and thus the period during which women are mostly likely to interrupt employment coincides with that stage in a career when a worker is best placed to benefit from educational leave.** In addition, women tend to find employment in the service sector of the economy, whereas training opportunities are disproportionately concentrated in the manufacturing sector (and even there, of course, there is discrimination between the sexes).

As far as conformity to sex roles is concerned, "a differentiated pattern of participation along sex lines is evident. While women and men record essentially similar experiences in general adult education, almost all vocationally related training offerings are more frequently taken advantage of by men. Moreover, women tend to enrol for the short technical courses; men predominate in the longer courses."***

* 6 months out of the last 12, or 12 months' total employment with the firm in Sweden, for example; 5 years in the Smederevo metalworks.

** "For married women ... the participation rate increases for the 20-24 year old age group, as it does for men and unmarried women. In the late 20s and early 30s, however, it drops sharply in some countries, mildly in others, and only perceptibly or not at all in a third group. The rate begins to rise again in the late 30s." The Role of Women in the Economy, OECD, Paris, 1975, p. 19.

*** MAS/WP6(76)4, paragraph 30 (OECD, mimeographed document).

In Chapter III, we discuss various factors that affect demand, and stress the need to adopt an active approach to its management. This is particularly relevant to mothers of young children, in that the absence of adequate child-care facilities of flexible working arrangements can easily inhibit them even from expressing a desire for further education since they see no organisational solution to the problem of care for their children.

Finally, "motivation may be totally non-existent for the least socio-economically advantaged and the least educated women, precisely those for whom real choice in employment cannot exist without further education. These women who remain at home or work part-time in poorly paid positions, are often uninformed about alternative employment possibilities and the availability of education and training programmes prepared for them. Programmes that offer equal access alone, without special efforts to overcome low motivation, are unlikely to achieve greater equality; women already endowed by wealth and earlier educational attainment seem to be the primary beneficiaries of expanded vocational training courses."*

c) Employees in small enterprises

The Bollate hospital furnishes a typical example of the particular problems faced by an enterprise of modest size, and we discuss this in the next chapter. Constraints of organisational feasibility which may be reasonable in the case of larger enterprises (such as the maximum of 2% of the workforce who may be absent at any one time) would, if strictly applied, have the somewhat absurd consequence of totally disenfranchising workers in small enterprises of any right to leave. Obviously, this effect can be to some extent mitigated by flexible organisation, but the problem remains. It is compounded by the fact that small enterprises must rely much more on external facilities (since their resources do not allow them to provide their own courses), by their tendency to operate in more competitive product markets than large firms, and by their often more 'conservative' attitude towards government, to the work ethic in general,** and also towards training programmes. This particularly affects their capacity and willingness to make specific efforts on behalf of the disadvantaged.***

Finally, the relatively high cost of the administrative effort involved should be noted; one advantage of working in a small firm may be the more personal atmosphere that prevails since there is less need for formal bureaucracy, but the absence of these administrative structures may act as a brake on those who wish to take leave.

* MAS/WP6(76)4, paragraph 31 (OECD, mimeographed document).

** See J.K. Galbraith, The New Industrial State, Boston, 1967.

*** See Myron D. Fottler, Employer Size and Success in Manpower Training for the Disadvantaged, Relations Industrielles, Vol. 29, No. 4, December 1974.

The specific characteristic, then, of the small firms' problem vis-à-vis educational leave is primarily organisational. That is to say they may, unlike firms in declining industries (see following subsection), perceive clear potential benefits for themselves and their workers, and yet be discouraged from making progress by the practical difficulty of implementing and administering paid leave schemes. From the public policy point of view, therefore, the principal, though not sole, question is how to encourage the development of the machinery to enable them to overcome this difficulty.

d) Employees in declining industries

Where it is up to the employer to consent to the leave, he generally does so in the belief that this will be of benefit to the firm in the future - not only, perhaps, in purely economic terms but also in the sense of improving industrial relations and offering his employees more satisfactory conditions. Where, however, the future of the firm is highly uncertain, he will be less willing and less able to grant his consent. This is especially the case in a declining industry; the future of firms in other industries may be uncertain, but it may be judged worthwhile to take the risk of investing in training. In any case, by definition a declining industry offers little incentive to workers to acquire new skills related to their current jobs, and on the other hand insecurity is likely to reduce motivation for more general education.

The decline of an industry is not necessarily to be regretted, and is a normal feature of economic and social progress. What is important, however, is the fate of the workers concerned. Consideration should therefore be given to how they may be helped to effect a smooth transition to another sector, and this will in many instances require special training provision - though of the sort that falls outside the scope of this study and into the field of broad labour market training. One might add, incidentally, that the smoothness of this transition will in part depend on the rate of decline, and this should be regarded as a factor susceptible to control rather than as an economic given.

What this amounts to is the need for a more direct form of public intervention and provision than may be the case for some of the other groups discussed in this section. The very nature of this group means that simple pressure or indirect incentives for employers will not be effective in extending opportunities for educational leave to the workers who compose it.

e) Migrant workers

We have already mentioned, in the first section of this chapter, how little information was offered on the specific position of migrant workers. Their case is a particular one, since it cuts right across the ILO classification discussed in Chapter I: general or cultural education has a special significance for them, in that their occupational

behaviour may be heavily affected by a lack of familiarity with the social and economic context, and the need for education about the functions of trade unions may be similarly basic - a commentator from Australia, for example, observed that the automatic deduction of dues from the payslip (as opposed to their collection by a union official) has meant that many of the migrant workers fail even to identify their union representative, since they are unacquainted with the institution of a trade union.

The particular nature of the needs of migrant workers have been discussed in many forums, and this is not the place to add to that documentation. We have already mentioned the provision that is made in some countries for language training, and would at this juncture only revert to one other theme, that of demand. Insecurity of employment and unfamiliarity with the language and customs of the host country may drastically inhibit migrant workers from applying for, or exercising a right to, educational leave unless a deliberate effort is made to attract and cater for them.

3. RESPONSIBILITY AND CONTROL

The introduction and administration of educational leave touches a large number of interested parties, and is subject to diverse organisational, political and even constitutional considerations. At governmental level alone, several departments will find themselves involved: education, manpower and employment certainly, and a number of others with a more tangential interest, such as immigration and social affairs. Employers' organisations, trade unions and bipartite bodies will be concerned at national and local level, as will administrators and teachers in educational institutions. Within the enterprise itself, decisions taken independently in different branches affect each other in ways that may be wholly unforeseen by the respective agents. We discuss this in Chapter IV, where three axes are singled out: the geographical, the hierarchical and the temporal. All this adds up to the likelihood of tensions and problems of coordination both between interested parties at a given organisational level and between different levels.

Sometimes the solution will be technical and mutually satisfactory; on other occasions it will be a question of bargaining and conflict. The distinction between responsibility and control is one that could form the subject of a lengthy treatise, and goes well beyond the scope of our subject. We assume as a working basis that questions of control refer more directly to the distribution of power where opposition of interests may occur, whereas questions of responsibility tend to refer more to organisational aspects. But the latter too will involve tensions, and the distinction is blurred and not to be insisted upon. From this perspective, and referring variously to the parties mentioned in the previous paragraph, we raise the following issues: the formulation of enterprise training policy, access to educational leave, its financing, its role in counteracting economic and social imbalances, and finally its content.

This study focuses on events within the enterprise, and it is therefore logical to look primarily at the distribution at that level of responsibility and control over educational leave. The first point to be made is that there is variation between countries and between firms even as to what areas are regarded as legitimate subjects of negotiation. In some cases, there is full bipartite discussion of training and manpower policy, and recognition is made of the union's right to participate in the formulation of that policy; in others, it is still regarded as purely the prerogative of management, and the unions are expected to restrict their sphere of interest to narrower issues.

What this boils down to is the scope of 'working conditions' as the non-financial component of the conventional 'wages and conditions' package: they may be interpreted solely in terms of hygiene, reasonable noise levels, and so on, or be taken to include such factors as career prospects and promotion policy. In the latter case, clearly, educational leave is more likely to appear on the table as a negotiable issue.

In whatever way a firm's total training policy is formulated, there is the more immediate issue of who should be granted access to educational leave in cases where no statutory right to it exists. This can be decided on a person-by-person basis, but where certain conditions have been previously laid down they may or may not have been the subject of negotiation. In these cases, the question is not so much 'who decides whether X should be given leave?' as "what are the criteria on which that decision is to be taken, and by whom were they formulated?". Perhaps it is the personnel department which has sole responsibility; perhaps the matter was formally presented to a joint body such as the works committee without it coming up for detailed discussion; or it may have been the subject of serious negotiation at industry or plant level. If it has been the subject of negotiation, this means that some issues will have been explicitly debated perhaps for the first time, both between labour and management and within each side; again, it is worth noting that a major side-effect of some of the legislation in the area of training has been to induce companies to reflect more consciously on the criteria on which their training policy is based.

Often, discussion of responsibility and control passes very quickly to financial issues. The simplest division might appear to be on the basis of he who pays has the right of control, and he who benefits has the obligation to pay. This line of argument assumes that the firm carries the costs of, and assumes responsibility for, training directly geared to its own needs, whilst the individual should bear the costs if he or she undertakes the leave for his own ends, and similarly that union education should be the responsibility of the union. In practice, however, such a division is demonstrably primitive and unsound. In the first place, the fact that an individual pays does not usually give him effective control over the course, except in so far as he can exercise consumer choice; the situation is therefore asymmetrical, since when

the company pays it is indeed in a position to exert control, determining content, length, timing and validation. More importantly, the 'purse-string' principle - that the payer has the automatic right to control - has effectively been long since abandoned: one has only to note the widespread, if not universal, right of union representatives to have time off to exercise their responsibilities, including the acquisition of the necessary skills, without loss of pay. Originally, this right may have been bitterly disputed, but its acceptance exemplifies how attitudes change over time - employers now recognize, albeit with differing degrees of enthusiasm, that trained and competent labour representatives are essential to the health of the enterprise.

One can extend that line of reasoning to argue that it is in the firm's interest to have a generally well educated labour force, so that there should be a presumption in favour of the firm, rather than the individual, bearing the costs of educational leave of whatever type. But it would obviously be unrealistic to hold that interests always coincide in this respect, and that what is good for the worker is good for the firm - indeed, the definition of 'generally well educated' is itself a matter for debate. The state, the enterprise, the union and the individual can all hold markedly different views. What one can say, by way of generalization, is that one index of expanding prosperity and improving working conditions is the extension of 'educational coverage' (on the analogy of health and social insurance) to meet personal needs. Perhaps more contentiously, one could go further and say that (unless a more collectivist approach is adopted) the more advanced this coverage is, the more it will confer the power to choose on the individual, independent of his employment position.

However, responsibility is not divided only between the union, representing individual workers, and the enterprise. In Chapter IV we discuss the relation of educational leave to various social and economic policies, and one aspect of this is the mobility of labour. It is hardly in the firm's direct interest unilaterally to promote, through training, the mobility of its labour force. Of course, in a given sector many firms will sponsor training and the assumption of common responsibility for it will reduce the amount of 'poaching' of skilled labour, but unless all the training a firm provides is highly job-specific the newly-trained worker will be in a better position in the labour market and hence more liable to change jobs. Governments, on the other hand, may wish directly to encourage workers to be ready to move, for instance to counteract regional imbalances, and if this is contrary to firms' calculations of their own interests it is hardly reasonable or wise to ask them to take on sole responsibility for the requisite measures. This is not a straightforward question of public versus private interests, but of minimizing, through such measures as collective funding, a certain incompatibility between macro- and micro-economic trends.

Another sort of tension has already been touched upon in the preceding section on disadvantaged groups. It may not make economic sense for the individual firm to make special provision for these groups, and yet it is socially unacceptable as well as often economically inefficient at the macro level to allow their handicaps to accumulate. However, assumption by public authorities of responsibility for helping the disadvantaged does not imply that there should necessarily be separate provision; indeed, if public training provision became too closely identified with compensatory measures, this would serve only to reinforce the isolation of the groups concerned and to widen the gap between primary and secondary labour markets. Instead, there is an array of incentives (direct grants, employment premiums, etc.) designed to encourage enterprises to share in the responsibility. Such is the quantity of training provided in any case by enterprises that it would be unwise of public authorities to ignore the momentum that exists, rather than reflecting on measures that could exploit at any rate part of that momentum for public purposes. For example, one criterion for the evaluation of a given training programme is the rate of success of its participants in finding appropriate employment. Companies at present tend to see training as an instrument affecting the supply side of an equation where the demand side - the number and type of jobs - is taken as determined. Public authorities, on the other hand, may be in a better position to originate action in job development, in affecting the demand for labour both qualitatively and quantitatively, and hence in assuring training programmes designed for the disadvantaged a higher chance of success.

If one turns to the content of the courses themselves, the question of control also emerges, and we look first at the role of formal educational institutions. The extent to which educational leave schemes are able to draw on existing facilities depends in large part on how far these institutions feel themselves obliged to become involved, and this in turn is a function of the manner in which responsibilities are assigned departmentally. Ministries of education and of labour have different priorities - adult literacy and improved labour mobility respectively, for example - and it is only reasonable that they should pursue them, but the extent of their willingness to collaborate is the key to a number of important questions. Do the schools, colleges and universities show themselves keen to participate and to make the necessary adjustments in terms of timetabling and teaching loads? Are they given sufficient encouragement by the educational authorities and sufficient information by the manpower authorities? Do training institutions outside the public education system complement those inside, do they compete usefully with them, or is there wasteful duplication? Does the educational provision cater for the individual's needs as well as the employer's or the state's (if there is no identity between the three)? How are the curricula devised - and in particular, who takes part in the process of curriculum development? Who evaluates? The answers

to these, and other, questions would reveal the way in which responsibility for the actual courses is divided - and might also reveal a covert division that does not coincide with the official one.

For, as is already obvious from the phrasing of some of the questions, the issue is not simply one of administrative collaboration and agreement (however difficult that may itself be to achieve in practice). More or less fundamental differences of interest may emerge between the social partners. Let us revert to the training of worker representatives as an apt example. It is generally accepted that this should take place in company time, and therefore at least to some extent at company expense. But there is no common agreement on the influence which the company should exercise on the content of this training. In some cases, the union may lean towards a sternly conflictual orientation which stresses the incompatibility of labour and capital interests; in others, a much more consensual approach is adopted, and attention is focused on the mechanics of harmonious bargaining. Another example, particularly prominent in Germany, is political or civic education whose complexion may similarly vary between conflict and consensus.

In this section, then, we have looked at the different lines along which responsibility and control can be divided: between different levels within the organisation (enterprise or administrative department); amongst different departments or ministries; between public and private sectors; and amongst the social partners. One may conclude by stressing that organisational analysis of a purely descriptive kind is unlikely to reveal the pattern of the power distribution. Naturally, fiscal, administrative and constitutional structures are crucial determinants of the position in any country, and these can be fairly straightforwardly taken into account, but other factors, such as the different priorities held by social partners, or the flow of information, are not to be ignored.

III

THE CASE STUDIES

We come now to the analysis of the basic empirical material assembled under the case studies. For each of the countries concerned, the background of legislation and collective agreements on educational leave has already been systematically described in previous OECD work,* and is therefore not repeated here. Our concern has been to take a closer look at the practical application of these measures where they are in operation, and not to give a representative picture of the incidence of educational leave over the whole country.

The most striking single characteristic of the present situation is the degree to which leave is taken for restrictedly vocational purposes. In this chapter, therefore, we will often seem to be describing a firm's training policy in the narrower sense of that term. This is a faithful reflection of the position in the majority of the enterprises studied, but we are at pains to point out on several occasions during this report that it does not imply that the evolution of educational leave in the future must or should maintain this close identification, nor that the benefits are to be judged in terms of increased productivity or career promotion.

Some further precision is needed. To begin with to place enterprise needs and individual development in straight opposition is misleading. It is not always the case that given a free choice the worker will decide to pursue non-vocational courses; for many people their individual choice is to advance their professional qualifications, so that there is no easy equivalence between non-vocational education and personal development. Yet whilst this runs counter to a partisan humanistic conception of personal aspirations, it does not on the other hand signal an identity between individual and enterprise ambitions. For as we have already noted the enterprise may not be in a position to offer suitable reemployment to those who have acquired new skills, and may therefore in a given economic context wish to restrict training opportunities, even though the courses for which the candidates present themselves are closely related to its operations.

Secondly, it is useful to bear in mind Becker's distinction between general and specific training.** The analytical power of this distinction will be increasingly tested by the growth of internal labour markets

* Developments in Educational Leave of Absence, CERI/OECD, Paris, 1976.

** G. Becker, Investment in Human Capital: A Theoretical Analysis, Journal of Political Economy, October, 1962.

(discussed in Chapter IV) in that it will be important to know how far the skills obtained are of greater value to the worker's current employer than they are to other employers in the industry. It is also relevant to the distribution of training opportunities, since it is likely that access to general training, which does more to increase the employee's mobility potential and hence the incentives that are offered to him to stay, will again be roughly according to position in the occupational hierarchy. In other words, the higher one mounts, the more the training to which one has access endows one with the sort of qualifications that are more valuable in that they command a wider range of potential buyers.

Thirdly, there are at least two other types where the purpose of the training is related to the functioning of the enterprise rather than to individual development, but is not limited to the purely productive (of goods or services) role of the workers: training for workers' representatives or shop stewards, and training for safety representatives. The former may be either for strictly trade union ends, or represent progress towards greater worker participation, both of which we discuss elsewhere. As for safety, the German Labour Safety Act of 1974 has not yet had the chance to attain any quantitative significance in terms of requiring release for safety officers, but is expected to do so in the future; similarly in the UK provision for the release of safety representatives under the Employment Protection Act may well come to be seen as one of the first steps towards a broader system of leave. One should note, finally, that the definition of the scope of training for representatives is itself an issue which affects the volume and distribution of leave as well as its financing. In Germany, for instance, the Postal Union (DPG) holds that the management has tended recently to define the claims for release under the Federal Personnel Representation Act much more restrictively than the union and the personnel council, and that this coincides with a similar trend in the private sector, where legal decisions have narrowed the conception of the right to release.

The chapter is divided into five sections, whose headings are self-explanatory. From these a picture of the various types of leave begins to emerge; we expect that future work on educational leave will be able to refine the approach and bring the picture more sharply into focus.

SECTION 1: INTERNAL AND EXTERNAL PROVISION OF EDUCATIONAL LEAVE

The Location of Courses

We turn now to look in more detail at the study period and courses themselves. First, the physical location, bearing in mind that in-house provision is not the same as on-the-job training and that 'in-house' can refer to a variety of locations which may involve travel and residential arrangements as well as facilities in the workplace. This has more than a purely organisational interest - it extends to the question of control over the courses, of how well those given outside the enterprise are seen to meet the firm's objectives and the relation of the enterprise to the wider educational institutions. Some attention is given at the end of the section to the third ILO category, trade union education, but the case studies provide a scantier picture of this area and it can only be repeated that this report is not attempting an overall, representative study of educational leave.

In the US Postal Service, the education is all in-house, provided at its Washington Centre plus 5 regional locations; in addition there are programmed learning facilities at some 218 post offices around the country. The other two postal services - the DBP and the UK Post Office - place similar, though not exclusive, reliance on their own provision. Most of the DBP courses are organised on their premises, with central, regional and local facilities as in the US. These include a management academy and two 'Fachhochschulen', or engineering colleges, at Berlin and Dieburg. The Telecommunications sections of the UK Post Office undertakes its own training wherever possible, but courses of a more general nature are given by outside institutions such as the local technical college or at a polytechnic or university. The size of these three postal organisations is one factor behind the reliance on, and preference for, their own courses; another must be their monopolistic positions within the industry and the specific technologies and skills which this involves.

Both of these factors would support the observation that the proportion of training undertaken in the Telecommunications centres is high for a UK public utility, who tend in any case to provide more of their own education and training. Just over 82% of their total training budget was devoted to internal training. In the Postal section, with lower expenditure on training, the equivalent figure (1974-5) was even higher, at 88.5%. Not surprisingly, the Telecommunications section economised its budget for external courses more drastically during the recent recession, reflecting the lower priority of more general education and training and the internal problems of reducing the size of their own centres and staff.

The other US enterprises contrast with the situation in the postal organisations. In the hospital sector, for example, all paid leave is

spent in outside institutions - for the New York hospitals, in post-secondary institutions only; for the Californian Kaiser hospitals, in professional associations and consultancy firms. Otherwise, apart from the paid leave provisions, remediation* is in-house but on the worker's own time in the League of Voluntary Hospitals, and the union at the Hospital Corporation runs courses, sometimes in their college at union headquarters. Again size and dominance of the enterprise (or lack of it) within the industry could be an important part of this contrast of the US hospitals with the postal services. The difference probably goes deeper, however; a further factor could well be the traditional links the medical world has with universities and colleges, links which are not as strong in many other industries. The remaining US enterprise, Kimberly Clark, with the degree of choice it allows for the courses, uses a variety of external institutions - mostly colleges and universities but also some secondary education establishments.

A wider survey in the US** reveals an almost exact equivalence between firms providing in-house (but off-the-job) facilities and those granting release for external courses: in 1975, of all private sector firms with over 500 employees, 75% provided in-house training whilst some 72% authorized workers to take outside courses. (This does not, of course, represent a balance in the volume of training as between in-house and outside.) We have mentioned elsewhere some of the difficulties confronting small firms but it is worth remarking at this point that even within this category of large firms, the smallest ones (500-999 employees) rely relatively more on outside provision (66% of them do so, with 60% using in-house) than do the largest (over 50,000) 92% of whom use external sources, 96% putting on in-house courses. This presumably reflects the fact that the bigger the firm, the easier it is to arrange viable in-house training, showing at the same time that the largest firms use significantly more of both in-house and outside courses than do the smaller companies. One would expect these differences to be magnified if firms with less than 500 employees were considered. One issue raised is whether the dependence on external courses, particularly of small firms, has been accompanied by signs of adaptability on the part of those who provide the courses. Another is the question of why, given size and resources, a company should prefer to develop its own training facilities - it will partly be a matter of the adequacy of other institutions, particularly in relation to the specificity of skills required, but company control in a wider sense may be crucial. This we return to in Chapter IV with the discussion of the developing importance of internal labour markets.

* Remediation is generally intended to provide basic skills, equivalent to secondary schooling, to adults who did not get them as young people. It is not specially designed to correct specific learning defects.

** Preliminary and unpublished data from Mr. Seymour Lusterman: The Conference Board, New York.

In contrast with the DBP in Germany, at Siemens it is a condition for the establishment of in-house provision that no equivalent external courses exist, though it is not reported whether the judgment on this takes into account both curricular and pedagogical aspects, nor do we know the ratio of external to in-house that this actually gives. Many of the facilities at Bayer seem to be provided by the company - particularly at its Leverkusen factory (with a workforce of 35,000) which dominates the local provision of amenities of many kinds, educational and social. As far as the use of external institutions is concerned, Bayer does not seem to extend itself beyond the statutory minimum requirements of the Labour Promotion Act for full-time leave, despite the fact that this leave is unpaid.

The Yugoslav firms, like the postal organisations, provide the bulk of the courses themselves, particularly the Belgrade railways. Here, most take place in the Railway Education Centre and the Higher Railway School in Belgrade and in the Railway School for Qualified Workers in Subotica. Furthermore, where local plants and workshops can demonstrate that they are equipped to provide training, some of the courses and seminars for qualified and highly qualified workers are held here as well. Some of the preparatory and advanced courses do take place in external institutions however; in the universities, for instance, including those workers with scholarships who are mainly university students. At Smederevo, although there are considerable reservations about the appropriateness of much of the provision made by the formal education sector, it is exploited to some extent. This is mainly for workers to undertake or complete their secondary education and for advanced courses in universities and higher education institutions. Of the 1,602 students who obtained leave in 1974 (apart from those completing their elementary education and the political and 'socio-economic' courses provided by the metalworks which most workers attend) 324 of these were for secondary schools and institutions of higher education: i.e. about a fifth attended outside courses. The rest were mainly organised by the Metalworks' Centre of Education.

Attitudes to External Provision

The Yugoslav report is most forthright in its reasons for concentrating provision on one's own premises rather than using the full-time schools and university facilities. The curricula in these latter institutions are criticized as overloaded with encyclopaedic facts, and rigidly segregated into different disciplines, whereas adaptation to workers' needs involves the development of interdisciplinary courses structured in modular fashion. Moreover, the physical features of the universities are unsatisfactory, being crowded and often with insufficient equipment and poor staff/student ratios. The criticism of the formal system is extended to the teachers who, besides being (perhaps understandably) not fully au courant with the works machinery and operation, appear to

teach in a singularly unenlightened style, employing stark lecturing techniques, requiring verbatim reproductions of texts and lectures, and insisting on exaggeratedly detailed knowledge. For both the improvement of facilities and the modernization of teaching methods, lack of finance was seen to be a major problem whereas the enterprise has more control to direct resources to those aspects of its education which are felt to need improvement. Altogether, therefore, there is a preference for using Metalwork employees to teach their colleagues, especially in the technical subjects that relate specifically to the firm's operations.

Nonetheless, particularly where the Metalworks or Railways do rely on outside institutions, there appears to be an unusual degree of communication between the enterprise and the school or university regarding the curricula of courses available to workers from the enterprises. This communication is being further institutionalized since the Law of Secondary Education and Law of Higher Education stipulate that in future the content of courses should be decided through consultation and cooperation between teachers and experts in production. But for several years already Smederevo are reported to have exercised an important influence on the structuring of curricula in a number of schools and university faculties.

As in Yugoslavia, criticism of the educational system was voiced in the UK, and lack of communication and knowledge about industry (on the teachers' side) was diagnosed as an important problem. There was concern about the quality of education and the attitudes exhibited by those entering industry for the first time (at graduate as well as secondary level). Leyland have tried to counter the latter by running courses which allow teachers to spend some weeks in industry but the response has so far been unenthusiastic. Several of the UK firms have developed their own aptitude tests, mainly for entrants to the enterprise, and managerial criticism of the education system stems partly from performance in these tests. Nevertheless it is thought that industry should also accept responsibility for its poor general image in the educational world despite individual exceptions. Further thought could be given to the reasons for this image, and the degree to which it is justified.

In the US, regular college faculties do the teaching where the leave is spent outside the firm, but it is not reported whether they are encouraged or helped to adapt their teaching methods to the new clientele in any particular way. The Postal Service occasionally consults university faculties but otherwise employs its own teaching staff. The reports summarized the position by saying that those administering the leave programmes found the educational institutions cooperative (e.g. some of the local colleges had arranged courses at times convenient for Kimberly Clark students) but not eager or innovative. On the whole, paid educational leave in the US is still too small to have had much impact of this kind on educational institution.

Italy is again something of an exception in the extent to which provision is made by the public authorities. An essential point is the fact that leave is taken outside the enterprise (physically and in terms of control). Moreover, this provision has increased considerably over the last several years. In Italy as a whole, the number of students from work in courses funded by the Ministry of Education has increased by over 500%, from 14,237 to 77,436, between 1974 and 1976. *

Important to emphasize, however, is the division of funding and provision made by different responsible bodies - much of it is funded centrally, though administered locally; the regions themselves organise and finance their own schemes; and in some cases municipalities and individual educational institutions are making efforts. The centrally funded are still the most important: 94% of the first year's courses (1974) being in first cycle state secondary schools. Even in Lombardy, which makes more of an effort than most regions to provide its own courses, Ministry courses catered for 3,865 students in 1974 compared with the region's own for 1,288 - a difference which has since increased. The regions still have considerable discretion in the way these funds are used and some have developed more than others. In Lombardy the increase in the number of students in these centrally funded courses from 1974 to 1976 was 3,865 to 11,251 (not quite 3-fold); in Campania, from 1,007 to 10,466 (over 10-fold); in Sicily it has been from 356 to 7,356 (over 20-fold). The scale of the increases must, of course, be seen against the different base figures, and these three do represent regions which now cater for a relatively large number of students. As mentioned above, municipalities and educational institutions, like the regions, do sometimes organise courses beyond the Ministerial provision. Bologna's own courses, for example, catered for 500 students in 1975, and in the same year universities in Italy ran schemes for 4,000.

There are, apparently, organisational problems deriving from this reliance on the existing public education service, of which two may be mentioned in particular: first, that the funds supposedly earmarked for teaching materials are, beside being inadequate, often very slow to arrive, and secondly that the timing is not always convenient, especially for shift workers. (This latter difficulty may originate partly in the system of teaching in teams of 4, established in order to have a viable number of students.) One example of the organisation of classes comes from the Pininfarina workers, who are divided into two groups of 35; one group attends classes from two o'clock to five o'clock in the afternoon (using their paid leave), the other from five to eight o'clock (making up their spare time requirements), and they alternate from week to week.

* 1976 figures, where not already available, are estimated on the basis of 20 students per course.

In conclusion to this part of the section something needs to be said about the public authority role in educational leave. We take up the question more generally in Chapter IV and restrict ourselves here to a summary statement. It has already been shown how attitudes to public provisions vary, and this is true both of enterprises and of workers. For the latter, external provision may have the drawback of representing in some way a 'return to school' with overtones that discourage participation, whilst on the other hand it does allow them the chance to take a break from the workplace. For the former, the subsidization of public provision may make it an economically sensible option, but its form may be inappropriate. A number of other factors, often locally determined, will affect both sets of attitudes; the point is that it would be simplistic to expect to remedy 'deficiencies' in existing educational leave by merely advocating 'more' on the part of the educational establishment - even given that so far initiative and effort have often come largely from the enterprise. A fuller investigation is required of which kinds of courses provided outside the firm would be useful to different groups of workers, what possible conflicts exist between enterprise and public authority objectives and the likely overall impact of particular public authority strategies in a variety of labour market contexts. In particular, we would suggest that policies for the extension of the benefits of leave to workers in the secondary labour market are a specially urgent issue, whether this is done directly through public provision, or indirectly by carrot and stick.

The Teachers

Beyond the question of the relation of training and leave to external educational provision, some of the case studies furnished greater detail about the teachers themselves.* For obvious reasons, such information was more readily available if the main locus of training is in the enterprise.

The case studies reveal considerable heterogeneity in the profile and status of teachers in the different enterprises. In the first place, they may be recruited and trained from within, or hired from outside, already qualified. If they come from within, their time as a teacher may form part of a system of job rotation, or be a step in a linear career progression. Their training may be nominal or substantial, with or without formal certification, and varying in the degree to which it emphasizes the acquisition of teaching techniques. They may be employed on a full-time or part-time basis, or to combine teaching with other functions. Finally, the degree to which they control the curriculum they are expected to teach will also vary.

The DBP attaches considerable importance to developing a corps of its own teachers, who receive residential teacher training in three

* 'Teachers' will be used to refer to all those directly engaged in helping students to acquire new skills, whether or not these are narrowly vocational.

periods, each a week long, and acquire the teacher's qualification which also entitles them to an extra allowance. A year after their initial training, the teachers receive a follow-up course. They number at present roughly 4,500. It should be noted that a Federal Regulation Act has existed in Germany since 1972, controlling teachers' qualifications and requiring their certification: so although they may come from the technical ranks of the workforce, their own training may be the responsibility of outside bodies. This regulation therefore applies to Siemens and Bayer as well as the DBP. The programme for the training of teachers at the DBP was developed under the auspices of the Central Vocational Training Council, where there is strong union involvement; one product has been a highly-praised teachers' manual.

The DBP rarely employs teachers from outside, except in the management training scheme, and it favours the use of full-time teaching personnel except in certain specialized technical fields. Policy in the UK enterprises is somewhat similar in this respect - they tend to employ their own full-time training staff, only bringing in external help for very specific courses which the regular teachers are not equipped to deal with. The DBP position does, however, refer only to courses which they themselves lay on; even for the DPG Fachschule, which is such an important source of job-related further education, the teaching is on voluntary basis with about 1,100 teachers from the DBP doing most of this work. For the teachers, as well as the students, therefore, it is outside normal working hours.

The Personnel Council at the DBP sees two aspects as needing attention: a further improvement in the status of teachers and an extension of the principle of rotation so that they should be as fully acquainted as possible with the working situation of the students. In Siemens, the company view is that full-time training is a job to be filled for some years before changing to another position and so it represents a type of rotation. But this introduces a distinction. The job of teacher in Siemens appears to be a step on or towards the management ladder and its successful discharge is highly rated as a prerequisite for success in this area, at least up to the middle ranks of management. Yet if the principle of rotation is fully applied, it would mean more a constant interchange in membership between the training unit and the other units, rather than membership of the former representing one step in an employee's progress up the hierarchy. It is not clear whether within the teaching corps there is a career structure, with progression from part-time to full-time teaching, but educational leave and training can evidently represent an avenue to promotion for teachers as well as for their students.

Judgment of the overall role played by the internal teaching corps is heavily influenced by the extent to which the firm draws on external educational facilities, as we discussed earlier in this section. If much of the paid leave takes place in external educational institutions, one would expect the firms to have fewer teachers on their own payroll,

and also perhaps to make less effort to ensure that they are suitably trained. For instance, the number of teachers at Siemens (about 400 full-time, and many more part-time) must be seen beside the policy of providing courses only when equivalent external measures are not available; it is therefore not surprising that they constitute a smaller proportion of the workforce than at the DBP. At Bayer full-time teachers numbered 202 in 1975 - a rather higher ratio, since their workforce is under a third the size of Siemens.

Information from the case studies is not sufficient to enable us to draw up an exact profile of the internal teaching staff. Yet whatever the size and origin of the staff, there are several interesting points to be made about the teaching methods employed, and their adaptation to the specific needs of experienced workers. At Siemens, the management is concerned that, since the primary criterion for selection as a teacher is technical expertise, pedagogical skills are developed, if at all, only at a later stage. Both Smederevo and the Belgrade Railways appear to devote great effort to hiring specialists and experts to teach and work, and strong emphasis is placed on the high level of qualifications of the teachers. (It is interesting to note that the instructors in practical areas are often the most experienced workers, which reflects the high value placed upon training, since these are presumably the most valuable employees.) Yet even those professionally qualified in technical subjects are required to demonstrate that they are capable of relating their subjects to the specific needs of the enterprise. This is especially true of the Railways, where all teachers in these areas, despite being specialists, must take examinations as proof of their value, yet the study of teaching method tends to be left to the individual and certain problems are seen to arise from insufficient preparation in this area. In Smederevo, on the other hand, specific attention is devoted to the actual teaching techniques; the Metalworks cooperates with the Rijeka University faculty for the training of teachers in industrial schools, and with the Departments of Pedagogy and Andragogy and of Management Sciences in Belgrade, in the organisation of special courses and seminars devoted to the methodology of adult teaching. Even so, some of the Metalworks external teachers were still criticized for seeing education as consisting only of lectures and examinations, with stress on the reproduction of texts and rote learning.

The nature of the links between educational leave schemes and the public education sector has been discussed in the preceding section, but on this specific subject of teaching skills it is worth referring again to Pininfarina where a precise problem was pin-pointed. In spite of explicit recognition (by a committee set up in 1974 to discuss course content and methodology) of the need to avoid simply repeating what goes on in basic education, teachers have exhibited reluctance to cross subject boundaries, and the establishment of effective interdisciplinary courses depends more on individual initiative than anything else. The teacher is isolated from the work process, and neither his original

period of study (often, in any case, some way behind him) nor such further training as he may have received - generally very ad hoc - equips him to grasp the educational aims and motivations of his new clientele. At Pininfarina, the boundaries between discipline were least in evidence during the first year (1974), owing to the presence of union activists who insisted on a very problem-oriented approach. With the 'dilution' of less activist students, the divisions have tended to reassert themselves.

Reference is made in Section 1 to the recent Swedish measures designed to improve school-teachers' understanding of the world of work. To conclude this section, we would point to a corresponding but different need that exists for those employed as teachers within the enterprise. On the one hand, the regular teacher lacks work experience but possesses professional teaching skills, and on the other hand the in-house teacher, particularly if he has been recruited from the firm's own labour force, is well acquainted with the work process but may not have been able to acquire teaching skills. But the situation is not symmetrical in that the teaching methods employed in schools and other formal educational institutions are often inappropriate to the needs of adult workers. The argument is not therefore that teachers in educational leave schemes should be given the same professional training as their colleagues in the formal education system, but that adequate recognition should be made of the need for teaching skills which cater specifically for this clientele.

Trade Union Education

We turn finally to trade union education and the question of location. As noted at the beginning, there are many gaps in our picture and we provide no thorough analysis of union education in general, but a number of points do arise. The major unions in the Telecommunications and Postal Sections of the UK (the PEOW and the POW) both organise central courses for their branch officials and shop stewards. For the POEW, the courses are given at three levels - basic, intermediate and advanced. Courses of the first type last two weeks and there are 50 places on each course, held six times a year. Both the latter involve one week courses; at intermediate level there are places for about 120 officials a year, at advanced level, about 80 a year. With the POW, 900 working weeks are allotted each year for central union education and the courses are each a week long. The DPG, like the TGWU at Leyland, runs courses in its own colleges as well as at local level. 2,500 union officials are trained centrally for one to two weeks, another 25,000 attend courses organised by the districts, and some 30,000 are educated at local level. It is important to distinguish between education for trade union members and specific union training - the DPG 'Fachschule', for instance, provide the former and use DBP premises, though outside working hours.

The unions in the UK wish to maintain control over shop steward training and believe it should be done independent of management but some of the unions do not have the resources to do it themselves and

in some cases training takes place on company premises - a situation the unions are unhappy about but for which they can see at present no financial alternative. Generally, resources are not devoted to education on anything like the scale required to meet even basic needs. The TUC reports that only 30,000 union officials received any education in 1975 out of an estimated 80,000 who required it and only £ 1.2 million was spent for this purpose in 1974 with an extra £ 200,000 from the TUC. This compared with about £ 10 million in Sweden (with only about £ 1 million from the government) and £ 7 million in Germany on trade union training schools alone. There are 21 residential colleges in Germany compared with six in Britain. Again the distinction between union training and education for members must be kept in mind, but there are clearly differences in priorities exhibited in these figures.

In the UK, the unions differ almost as widely amongst themselves in their efforts, differences that are not simple reflections of union membership and resources, and no small part of the increased attention given to union education has come from the TUC - between 1966 and 1976 the number of students on TUC courses rose from 269 to 18,000. In the face of limited funds, however, the alternatives are not simply to hold courses in residential centres or on the work premises (with possible management involvement as at Leyland). The TUC strategy has been to reduce relatively expensive central courses in favour of local union studies centres in places like polytechnics and extramural departments, and to work through the Workers' Educational Association.

Whilst the case study provided little information on union education in the US, we know from a previous CERI report that "some twenty to thirty thousand trade union leaders are authorized by corporations each summer to take educational, union, or personal leaves of absence to attend the union's one-week residential schools often conducted in cooperation with a state university or college". * A further distinction may thus be needed between leave for union officials which is educational and that which is devoted to the discharge of other union duties. In Italy, however, such a separation is deliberately avoided - the development through education of one's skills as a union official is regarded as part of those functions. Under Article 24 of Law 300 (1970) a minimum of 8 days a year unpaid leave is granted to union representatives and Article 23 of the same law guarantees paid leave for senior officials. It is not specified in the report how many participate under this legislation.

Priority is often explicitly given to trade union education. In Sweden, for instance, where the numbers applying for leave under the Law of 1975 are so large that selection has to be made, the highest priority is given to trade union training. Of the 98 collective agreements that contained specific provision for release in Germany (out of the 460 which made up a Ministry Survey) 41 referred to workers' representatives

* Developments in Educational Leave of Absence, p. 51, CERI/OECD, Paris, 1976.

only. Yet within Germany, which appears to attach a relatively high level of importance to trade union and worker representatives' education, participation can differ significantly. In Siemens, 500 out of 1,500 works council members obtained release since the Works Council Act of 1972, averaging slightly less than three days; at Bayer participation is much closer to 70%. For shop steward training at Bayer, however, the position is rather different - the Leverkusen factory alone has about 500 shop stewards and under a local agreement only 24 are released each year, for 1-2 weeks and without pay. The relatively greater access of labour representatives to educational leave reflects the fact that the adequate discharge of their functions requires considerable education, particularly as these functions expand to include more areas and more detail. The adequacy of resources to enable them to perform these functions is likely to be an issue of some urgency in several countries, as unions are called on to share responsibilities at all levels.

SECTION 2: DEMAND FOR LEAVE

The previous CERI study showed how low take-up of leave can be, even when the benefits are freely available - as in the case of Belgium, or in the UAW agreement on tuition refund with General Motors, both of which had a take-up rate of 4%. There are many factors influencing demand and affecting participation rates, and also widely differing roles that demand plays in the profiles of the leave and training of the enterprises studied. Here we operate with what might be described as an 'active' concept of demand - that, far from being something which simply exists and expresses itself as such, it can be stimulated and encouraged, or, conversely, discouraged. Information is clearly a crucial factor and it is to the means of its distribution that we turn first.

Information, Guidance and Counselling

The most common method of informing the personnel is, unsurprisingly, the circulation of brochures and the posting of information on notice boards. In some cases the circulation is universal, in others not. At Bayer, for instance, about 40,000 copies of the brochure 'Bayer Abendkurse' are printed for a workforce of some 65,000; the original policy was to mail one copy to each employee, but it is now argued that not everyone is interested and the brochures are made available in the different units. Similarly at Siemens, information is obtained from notice boards and at local units of the firm: here it was explicitly reported that the programmes are not available to everybody. In the

DBP, where note sheets are circulated through postal units, the union argues that the information does not reach all personnel (a similar union complaint is made in the UK Post Office) and the management counters that it is accessible to everyone - an important distinction. Where the unions are not involved, as at the Kimberly Clark Corporation, management's distribution of details becomes the more important: like the examples above, brochures and bulletins are a major channel.

Mainly, though, the unions play an important role. At Pininfarina, the 5-person body set up by the union to administer the paid leave (the 'Commissione delle 150 Ore') has as one of its specific tasks the dissemination of information to the workers, and there is in addition a general effort on the part of the union to promote awareness of leave possibilities. At the Bollate hospital, the active involvement of the union after the first year had a decisive effect on participation - in short, demand in Italy is seen very much as a function of union activism. In the US, unions also appear to have largely assumed responsibility for information, via newsletters, board postings and union meetings. A specific effort is made by District 37 of the AFSCME in New York through the distribution of a special union periodical entitled 'the Educator'. Where union-organised courses form a significant portion of available education, as in the DBP and Siemens, union meetings and shop stewards obviously play a central part in the dissemination of information, and this is true, to a lesser extent, of the other types of courses offered. Generally, the attitude of unions and workers' representatives can decisively influence what people find out about facilities and possibilities.

The most developed channels enabling access to information exist in the Yugoslav enterprises studied. The self-management process means that the worker has a chance to have a say at the outset in the annual formulation of the enterprise's education policy and in discussions with his organisational unit. The right to be informed is among the formal regulations concerning education in the enterprises, passed by the workers' councils. General information is available at the education departments and at conferences and meetings of the trade union and youth organisations. Furthermore, the education and personnel departments in both the Metalworks and the Railways are responsible for the announcement of 'competitions' through which the workers apply to go on courses.

Obviously, there can be considerable variation in the quality of presentation of written information, with some of the pamphlets being much more appropriately and attractively designed than others, but in any case the circulation of brochures is an essentially passive means of allowing demand to express itself. Similarly, the elimination of administrative obstacles and bureaucratic mazes is an important precondition but is essentially a path-smoothing operation rather than an active attempt to encourage participation. Union meetings and the like can go further in stimulating demand, as can the general level of

management encouragement, but a more positive initiative is the establishment of effective guidance and counselling. In Germany, such services appear to exist only as an incidental part of the general personnel service with some extra guidance provided by Works Council members, though at Siemens it was reported that, whilst counselling may be ad hoc, participation is encouraged and 'strongly stimulated'. (In some cases, however, the union is not satisfied with the efforts made to inform and interest the employees.) The Yugoslav personnel departments similarly offer guidance - this is one of the jobs of the psychology section of the department in the Metalworks. In the US, it ranges from the wholly casual, in the Kaiser Hospitals and the New York League of Voluntary Hospitals, through the incorporation of such guidance services as exist into the initial selection procedures, to the initiative taken by the Hospital Corporation of New York in hiring a group from New York University to establish a guidance programme.

Whether the setting up of formal procedures guarantees adequate advice and information, or ensures that it reaches all workers equally, is another question. As a matter of emphasis, some of the workers at Smederevo reported that they were better informed of the consequences of not meeting their obligations if they undertook leave than they were of the facilities themselves. And for certain groups more than others, guidance will involve encouragement or even active direction.

The point is made categorically in the Swedish report that dissemination on a person-to-person basis is a more effective means of informing people. (This is reinforced by a survey in Italy which showed that 49% of those taking courses in the manufacturing sector had become aware of their right through the trade union and a further 13% via friends; only 15% had done so through posters in the factory, newspapers or television.) Sweden has initiated a significant new development in counselling through the creation of 'educational organisers'. They operate at plant level with rights similar to those of shop stewards, and their responsibility is to give union members information on their rights to leave, the courses available, and other educational benefits. They are funded by the unions and subsidized by the government, and are elected by the trade union members in the enterprise. At the moment, the aim is that there should be about 30,000 blue collar organisers and 15,000 white collar organisers with a training rate of some 3,000 per year. The following observation from a previous OECD publication refers to information on employment in general, but is equally apt for training opportunities: "The difference of a dual information flow system, which is based on different value judgments and on the implied inherent conflicts of interest between employers and employed means that some information which workers consider important to their choice of job cannot reasonably be expected to be obtained from official sources."*

* Jean Vincens and Derek Robinson, Research into Labour Market Behaviour, OECD, Paris, 1974, p. 119.

This raises the issue of who should be responsible for counselling if it is to be extended at enterprise level. If the workers' representatives are responsible, it would (unless they are given specific rights, as in the Swedish example) add to a workload which is often already onerous: the works council members at Bayer explicitly mentioned that they find very demanding the scope of their legal tasks and the range of factory issues they are called upon to deal with. And as with evaluation, which we examine in Section 4, such a service does represent a cost that someone has to meet.

Individual Choice, Supply and Demand

An examination of demand, however, needs to go beyond consideration of the provision of information. For one thing, if leave is seen as a quite normal occurrence within the enterprise, it is likely that many workers will come regularly into contact with colleagues who have been involved, and will therefore be stimulated to consider its possibilities for themselves:* at Pininfarina, for instance, interest seems to have been transmitted from the skilled and senior workers to the younger and less skilled. However, this assumes that individuals are able to take the initiative in applying for leave, given that this choice may be more or less far-reaching and that obviously for many types of leave only certain groups are eligible or have a realistic chance of selection. But individual choice may be even more limited than this allows - the UK furnishes the major examples where the initiative rarely comes from the individual and this explains why it has not featured in the discussion so far. This difference needs to be elaborated since it has powerful implications for the role of demand.

In the UK, training is given to those in particular jobs or at certain levels, often following promotion. Thus the selection procedures for promotion become much more important in determining access to training, and promotion itself may only occur when there is a vacancy. In this sense, then, the individual frequently exercises no choice in the training he receives and one could say that participation in leave and training is supply-dominated and more closely tied to business aims, objectives and constraints than in the cases where there is a stronger element of individual choice. It was reported, for example, that as much as 80% of the training in the Postal section of the Post Office is mandatory. The unions are aware of this: in Telecommunications, they believe that more emphasis ought to be placed on training that would give individuals the opportunity to advance; and at ICI, with its paternalistic approach, the unions criticize the company policy of

* For peer group influence on attitudes to education, see H. Miller, Participation of adults in education, Brookline, Mass., 1967 (for workers); M. Rees and W. Paisley, Social and Psychological Predictors of Adult Information and Media Use, Adult Education, 19, 1968 (for family and friends).

training only for its own needs. The British firms are, of course, by no means unique in this respect, and in any case it should be remembered that the UK case study was weighted more in the direction of enterprise training policy as a whole, rather than pure educational leave. In the US Postal Service, participation rates are determined mainly by training opportunities which are taken as fixed, and those who fit the training objectives are asked by management to participate. This is not to suggest that the individual has no choice, but it takes the form of impressing those who recommend promotion and has more direct links with advancement than with leave or training. The implication of all this is the much diminished importance of the individual demand for leave, in contradistinction to the situation where an individual right exists.

Alternatively supply can be closely tied to demand. The courses offered by the DBP are said to depend largely on the demand of individuals and administrative units, though we cannot tell from this which is actually the more important. The wide range of vocational further training made available outside working hours by the DPG - the major union at DBP - is more positively tied to individual demand: facilities are provided if at least 16 members of the local personnel are interested. The dependence of supply on demand can be double-edged - it may stimulate demand insofar as one's very request may help to induce provision; it may be discouraging if many do not seriously consider leave unless the facilities are already there for them to see.

Efficient information and counselling services may be provided and a formal right to leave may exist, but demand for education will still often be heavily influenced by the nature of the facilities offered, and there is therefore a broad category which one might call 'supply-led demand'. The availability of education provision will of itself induce demand which would not have found expression in its absence. But the volume of this demand depends in large measure on the appropriateness of the provision to the needs of the potential students.

The point to be made here is simply that the character of the education - the curriculum, the teaching methods, and so on - is yet another of the variable factors that render untenable the notion of demand as a static phenomenon independent of its context. If courses are offered on subjects perceived as relevant, at times which are convenient and in ways which do not forcibly remind students of distant and probably uncomfortable schooldays, people who had hitherto regarded education merely as something that happens to their children are likely to present themselves in relatively large numbers. The converse is of course also true.

So much for the effect on demand of the conditions attaching to entry into the study period and of the nature of the education offered. What of the effects on demand of the outcome of the leave?

A general rational choice model may be useful to bring together the individual's perceived costs and benefits as indicated by the case

studies. The practical guarantee of promotion or increased income in the Yugoslav cases means that obvious benefits can be derived from education and training. That one's income is maintained and social insurance and pension rights guaranteed reduces dramatically the risk of personal sacrifice. The links between leave and promotion for the other enterprises are examined in Section 5 and there it is seen that the situation varied markedly between enterprises and between different groups of workers. A key factor influencing demand is whether the individuals in the workforce regard the potential benefits as making their personal costs worthwhile. Of importance here is the degree to which requirements for particular jobs (in the form of qualifications and examinations) are highly visible and therefore provide concrete goals for the workers to aim at, in contrast to a situation where their chances of promotion may be formally the same but where the means of achieving it are much less clear. The correspondence between qualifications and steps in the occupational ladder appears to be relatively clear in Yugoslavia and the DBP. And, despite the generally passive role of public authorities in the US, they can provide a stimulus to demand by imposing educational requirements for specific jobs. That many hospital and health care workers are licensed by the state as a condition of employment is a direct encouragement to obtain that licence through further training and may make extended paid leave a necessary condition for the acquisition of further credentials. Similar considerations apply to Italian hospital workers and this accounts for the fact that 65.7% of them regard the acquisition of a recognized qualification (for internal promotion or external mobility) as the most important perceived reason for taking leave, compared with 35.1% of the workers in the engineering industry (see Table 1).

On the other hand, the obligations involved in the Yugoslav enterprises may be discouraging (and we have already seen that workers are made fully aware of them in the Metalworks). In both the firms, the individual is required to repay the costs of his education if the course is not completed and the reasons for non-completion are not considered satisfactory. This also applies in the Belgrade railways if the individual does not return after the course for a period at least twice as long as the duration of his leave. A significant feature of Bayer's training and education programme is the extent to which the company expects personal effort and sacrifice. Many of the courses, for instance, are in the worker's own time and evening courses leading to trade examinations last for as long as three years. This is particularly true of general broadening and updating of qualifications or knowledge - fully paid daytime leave from work is only possible for very directly job-related courses. Whatever the personal costs this represents, many still manage to use the facilities offered; it was reported that sometimes the language laboratories are occupied until 11 p.m. On the other side their development of company examinations for craftsmen diminishes the effect of individual reluctance to take formal external examinations,

Table 1. PRINCIPAL MOTIVES FOR EDUCATIONAL LEAVE AT LEVEL OF SECONDARY EDUCATION

(Percentage responding; may total more than 100 as multiple answers permitted.)

	ENGINEERING WORKERS	HOSPITAL WORKERS
1. Obtain a certificate enabling me to progress in my work	23.4	48.6
2. Acquire a better understanding of my work situation	55.1	46.7
3. Meet people to discuss common problems	55.1	41.0
4. Acquire secondary education qualification to help change occupation	11.7	17.1

SOURCE: CENSIS, Rome 1975.

thereby enabling more craftsmen to see education as a possibility for themselves.

One important effect of the degree of personal sacrifice involved at Bayer is that those with higher initial education and qualification levels are most likely to be sufficiently motivated to take part, since they are in a better position to ride the costs and have a relatively enhanced appreciation of the potential value of education. The importance of this effect is clear, in that inequalities in motivation and interest reinforce existing inequities in provision and opportunities. Even where no groups are positively favoured, as at the Kimberly Clark Corporation, the 34% overall participation rates comprise 50% for exempt (higher level) employees, a lower rate for other salaried (non-exempt) workers, and only 11% for hourly workers. * There are also certain groups - shift workers, for instance - for whom access to education presents numerous problems. Bayer were reported as providing certain courses specifically for shift workers, but personal costs of attending and seeing a course through may still remain high. Nonetheless, demand can be stimulated among groups who normally

* The figures give the proportion participating out of the eligible rather than the total workforce. Eligible employees are all those who are not union members plus those in the 3 small unions which have negotiated educational leave under the company's plan. "Exempt" means exempt from provisions which require payment for work beyond 8 hours a day, and they are mainly higher white collar workers.

do not enjoy educational benefits; partly it will be supply-led through the offering of courses specifically for them. The US report made the point that there at least, when an active role is taken by an employer or union training unit and job promotion is expected at the conclusion of the leave, there is no lack of interest among unskilled workers despite possible short-term financial sacrifice on their part.

This is one area where the public authority has a definite role to play. The provision of federal training funds for the disadvantaged groups programme, in the case of the Hospital Corporation in New York, can stimulate interest and participation among those who could otherwise not consider leave to be a possibility. The Swedish law of July 1975, establishing extended rights to full-time educational benefits in the public and private sector, set out to encourage low-paid workers and women to participate. More than twice as many women as men applied in May 1976 (10,365 against 4,549) and expectations were realized when almost 75% of approved places went to women. Equally, nearly 75% of successful applicants earned 3,000 Sw.Kr. or less and more than 50% of participants had 8 or fewer years of schooling.

This model of perceived personal costs and benefits makes it rather less surprising that, given the choice, 82% of courses undertaken by workers at the Kimberly Clark Corporation were job-related rather than of a more general or non-vocational nature. It is not, therefore, an argument against non-vocational courses that the demand for them does not exist - if the sacrifices that have to be made are set against the diffuse and often intangible benefits it may even be surprising that 20% of the workforce chose as they did.

Finally, we briefly depart from such an individualist view of demand. The more general initiatives of unions and worker organisations can be crucial. In Italy, and in all the hospital and health care examples in the US, the setting up of paid leave came directly from the demand by the labour unions - the provisions were negotiated and made part of the labour agreements. Indeed at Pininfarina it was explicitly stated that participation in the types of evening classes that lead to individual advancement was weak because the labour force preferred activities which favoured collective progress. In the other case studies it is more difficult to see the extent and effect of union demand in this area but it could be considerable and ought not to be ignored. It would be interesting to know what relation there is between leave and training provisions and union goals and priorities. Do they, for instance, see themselves mainly concerned with economic benefits and working conditions, or do they encompass broader goals; and whichever is the case, what effect does this have on our area of interest? Equally, from the point of view of the enterprise, the legal stipulations and requirements relating to leave can be seen as part of a broader-based demand, though using a somewhat different interpretation of 'demand' given the sanctions which the law has at its disposal.

One issue can be mentioned in conclusion: the striking of a balance between stimulating demand, in particular among those who could be least likely to present themselves as candidates, and the exercise of sufficient control over the demand flow in order not to be flooded by it.

SECTION 3: DURATION AND DISTRIBUTION

The duration of the leave and training varies enormously. At one extreme in the case studies were the small number studying for the highest grade (D) in the DBP technical service, where the average was six years; at the other is the much commoner picture of courses, meetings and seminars which last only a matter of days. Apart from the questions of location and control (see Section 1), the leave can be taken in a variety of ways - it may be full or part-time or a combination of the two, or it may involve evening or weekend study. Given such variations, the distinction drawn in Chapter I between extended and restricted leave is more a useful shorthand than a hard analytical tool, but the questions of 'how long?' and 'for whom?' help to identify groups who are relatively favoured or neglected, and considerations of equity form an important part of this section. Finally, discussion of the duration of educational leave and the extent to which it entails absence from the workplace must deal with the problems, if any, which companies face in managing and organising work whilst employees are away.

The Duration of Leave

We look first at 'extended' leave in the case studies. At the League of Voluntary Hospitals in New York, it lasts anything from 5 months to 2 1/2 years, the mode being about two years, and at the Hospital Corporation, from 6 months up to two years. In the third New York example, under the recently implemented Metropolitan Nursing Homes' programme, the study period is two years but it is organised in a different way, combining a 'classroom' period of part-time education with a 'clinical' section of full-time paid leave in the latter part of the two years, whereas in the other two hospital groups, leave is full-time and continuous. This illustrates that there is a variety of possibilities for the organisation of courses and room for innovative thinking in fitting courses to the needs of the groups involved, whilst recognizing that the implications of any particular arrangement will be different for those various groups.

The two Yugoslav enterprises also have relatively extensive periods of education though again organised differently. In the Belgrade railways, courses for qualified and highly qualified workers last 3-6 months, increasing to 9 months for technicians, 3 years for secondary school

education and 2 years at the railway school. Courses at post-secondary institutions often involve 2 years' study, though apparently many of the scholarship students at university and those studying part-time in the higher railway school prolong their education for another 1-2 years. Yet whereas this is mainly full-time, the Metalworks prefer to build up towards the qualifications on a part-time basis and thus the worker is in continuous contact with the enterprise during this time. The length of the courses were reported, therefore, not in months or years but in 'periods':* to achieve the grade of 'professional qualification of semi-qualified worker' requires 200-640 periods, that of qualified and highly qualified worker takes 500-1,800 periods. Retraining for promotion is shorter, needing anything from 40-200.

Entitlement to full-time leave in order to prepare for examinations represents an interesting development in Yugoslavia and Italy. In Smederevo it amounts to 15 working days for each class at secondary school or five days per examination in post-secondary institutions, 10 days for diploma examinations and 15 for the writing of dissertations. Thus educational leave is extended expressly for the last sprint to the certificate as opposed to the period of study leading to it.

In the case of Italy, there are two points to be made. First, the 1969 law on worker students gives the right to three days' leave to those preparing for compulsory secondary education examinations and two days for university and specialized medicine. Secondly, in the collective bargaining agreements which have formed the basis of the case studies, leave for examination preparation is one of the aspects that distinguish the private from the public sector. In the former, leave for preparation for examinations is counted against the number of hours contractually agreed for leave purposes, whereas the public sector grants it in addition.

The Metalworks stipulate a maximum period of two years for which study leave will be fully supported, a limit in marked contrast to the stipulations of other enterprises which represent examples of 'restricted' leave - five days a year in the Kaiser hospitals for example. Leave is often even shorter than this, meetings and seminars in the Californian hospitals usually lasting 1-3 days. The maximum paid leave at Kimberly Clark is two weeks a year, though much of the study is done on a part-time basis or in the evenings and weekends. They do have a special extended leave programme allowing a year's absence from the firm, but there has been only one such case in 1 1/2 years. Kaiser, Northern California, have introduced the possibility of a more substantial break - leave can be accumulated for up to four years, thereby giving a total of four weeks. The US Postal Services also sometimes run courses together to allow a longer break at the training centre; here most of the individual training periods are 1-3 weeks long, though they do occasionally run for up to six months.

* A 'period' is usually 45 minutes.

It is interesting that the hospitals in New York and California should be in such striking contrast, since they cater for very similar occupational groups. There is a different emphasis in objectives between the two as we see in Section 5, the aim in New York being clearly to provide promotion and upgrading. We can forward the tentative hypothesis that restricted leave will be closely bound by enterprise constraints and goals whereas extended leave offers at least the possibility of wider objectives being realized by the individual, though this will by no means be always the case. The differences between the US hospitals also serve to qualify the argument, powerful though it may be, that certain workers necessarily require longer training than others because of the complexities of skills to be learned. Enterprises can differ considerably in the periods of leave justified for the same occupational groups.

The duration of leave clearly affects the degree of difficulty experienced by the firm in organising it. Perhaps one of the surprising features of the case studies is the extent to which the enterprises do not view the problems of disruption of work through the absence of its workers on leave and of replacements (if they were recruited) as particularly significant. Clearly, the duration of the leave is an important factor - in most cases, workers will be away for a matter of days or, at most, one or two weeks, in which case it can be handled in the same way as temporary absence through sickness. If participation rates are not generally high, this is further reason why the enterprise can easily accommodate short periods of educational leave and training. These reasons were explicity given by the Kaiser hospitals for their ability to cope with the problems. Where much of the study is in the worker's own time, as at Bayer at Kimberly Clark, it is obvious that no great difficulties are encountered.

What of those companies where longer periods are taken? The relation between leave and promotion (Section 5) is one important element of the answer; where workers will return to new jobs, then their old posts can be filled by permanent staff, thereby removing the problems of disruption and of the uncertain status of replacements. Thus in the UK, where training is often given on promotion which is, in turn, closely tied to the existence of vacancies, no major problems of this kind were reported. The same holds good in the New York and Yugoslav cases, so long as vacancies exist and workers are not returning to their old jobs. Where the contract is terminated with an extended absence, as for those in Bayer whose studies are supported by the provisions of the Labour Promotion Act, the difficulties are more the individual's than the company's. Bayer will replace him and whilst he is given preferential re-employment, this is dependent upon the existence of vacancies. This is a major problem area facing future policy on educational leave if it is to move away from the restricted type, narrowly dependent on enterprise needs and openings.

In this respect problems of disruption of work received attention in the studies of both countries where a right to leave exists, Sweden and Italy. In Sweden, the employer's main right under the law is to postpone granting leave for organisational reasons. In such cases he has to justify the postponement explicitly, and in any event it cannot be for longer than six months without agreement from the trade union; if such agreement cannot be reached, the union's interpretation is valid until the dispute has been examined by the Labour Court or settled through arbitration.

In Italy, the problems raised are closely related to the size of the firm or, more immediately, the plant or working unit. At Pininfarina, the resistance of supervisors to educational leave was in part due to the burden of reorganisation which fell on them as a result of absences. In the Bollate hospital the absence of three or four workers out of a working group of 14 makes an enormous difference. In this case, replacements are not hired and the work is shared among the remaining members of the group, creating very high workloads for those individual workers. In the small enterprise it is even more difficult to replace the absent employees, both in terms of available manpower and with the problems which are faced when the student returns. The case studies did not generally report difficulties of this sort mainly because the enterprises are large, leave is often short and control is frequently in enterprise hands. Where these conditions do not obtain, attention may have to be focused on alternative solutions.

The distribution of educational leave

Whatever the variation between enterprises, certain employees within the firm receive more extensive training and leave than others. We turn now to this distribution, one which is closely related to position in the job hierarchy. In terms of participation, for instance, whereas 10-25% of the registered nurses in the Northern Kaiser hospitals went on courses in 1975, less than 5% of other workers did so. Yet it is not a straightforward symmetrical relationship - employees in the middle levels of the firm often have much more substantial periods of education than their managerial seniors. For example, distribution of leave amongst the different categories of worker at Pininfarina is pear-shaped, with skilled workers dominating (see Table 2). Nor is it differentiated only in this vertical dimension; certain sections of the workforce, in the highly technical areas for example, often receive longer training than others who occupy equivalent positions in the authority structure.

In the DBP most of the courses last 3-14 days, but it is reported that for craftsmen and technical personnel it may well be longer and for some highly specialized technical skills such as new electronic telecommunications techniques, the training period may be up to a year. For the very highly skilled and educated personnel, the DBP

Table 2. PARTICIPATION IN 150-HOUR EDUCATIONAL LEAVE AT PININFARINA (1975/6)

CATEGORY OF WORKER (IN DESCENDING ORDER OF HIERARCHY)	PERCENTAGE OF CATEGORY TAKING LEAVE
V	1.2
IV	2.8
III	6.0
II	2.6
I	-

I - unskilled manual.
II - manual and routine white collar: work requires little training or experience.
III - skilled manual and white collar: work requires qualifications or equivalent experience.
IV - specialized manual and white collar workers with supervisory functions: work requires qualifications and experience.
V - as in IV but with lower managerial functions.

supported much more extensive leaves (until 1975, when they were drastically reduced); those at the 'Fachhochschulen' and 'Ingenieur-akademien' last for an average of 3 1/2 years and those mentioned at the beginning - technical service grade D - for an average period of 6 years. At another of the postal organisations examined here, the US Postal Services, training is concentrated largely in the middle levels, among craft workers, first line supervisors and low level managers. A 'highly technological bias of training efforts' was reported at Siemens which concentrates opportunities among the skilled and technical workers. To take yet another example, the Telecommunications section of the UK Post Office has clear differences in the length of training between the technical and other branches at all levels in the hierarchy. In fact, this latter case points up a further inequality in training provision which we examine shortly, for most of the craft and technical workers are men whilst the large majority of the clerical personnel in the Telecommunications section are women. Below, we look beyond classification by position in the job hierarchy to broader categories of the workforce who are disadvantaged in terms of educational leave.

The relation between access to leave and position in the job hierarchy is often assymetrical, those in the upper echelons frequently having shorter or fewer courses than their middle level colleagues. Obviously, enterprises will vary in the emphasis they place on management

training. At Siemens, ICI and GEC, for example, it is a well developed part of their programme; at others, such as Bayer, it does not appear to play such an important role. In the DBP academy for managers, courses usually last 1-2 weeks, at British Leyland about 5 days. Care must be taken not to place too much stress on these patterns of distribution; for one thing, there is even more variation than usual between the different firms, and furthermore management training is normally still much more developed than that for the semi-skilled and unskilled workers. Moreover, many of the senior personnel will themselves have received an extensive education at some stage in their careers, a feature which remains hidden in the cross-sectional view which has been taken in this study.

Widening our focus to examine the position of the groups singled out in Chapter II meets with the problem referred to there of large gaps in company information. Some observations are possible but it hardly gives a complete picture. One result that does emerge is that leave is frequently concentrated in areas where women are under-represented. Further figures from the case studies support this observation: in the DBP, women dominate the 'employee' category as well as forming the large majority of part-time workers (93% in 1974/5), and were a much smaller proportion of those with civil service status (17% in 1974/75). Yet it is the civil servants who receive, proportionately, a significantly larger share of the leave provision. There is not much danger of committing the ecological fallacy in this case - if anything it provides a conservative estimate of female under-representation. * Women form 12% of the workforce at Pininfarina but represented only 8.8% of those who received educational leave in 1974/75 and were wholly unrepresented the following year. In Germany as a whole in 1972, only 22% of those benefiting under the Labour Promotion Act were women. In some cases, the picture is reversed - the nurses who take educational leave in the US hospitals are predominantly female workers, but this is a clear example of a feminized occupation and the promotion that may result from the leave in this case does little to alter the main patterns of female employment.

This is not the place to develop the major issues of women's employment. It is worth remarking, however, that educational leave is one means through which women could strengthen their position in the labour market but are, as yet, under-represented or participate more in areas which are already feminized. Though we expressed reservations about seeing the role of public authorities as filling the gaps left by enterprise education and training (Chapter IV), some initiatives of

* This 'fallacy' refers to the dangers of deducing characteristics of individuals or subgroups from features of larger groups to which they belong. So, in this case, it is conceivable, though highly unlikely, that the small number of women of civil servant status dominate the provision enjoyed by this category, while the men, who form the bulk of civil servants, are under-represented.

this kind may be needed. In Sweden, by May 1976 almost 75% of the successful applicants for support under the 1975 law were women (4,549 compared with 1,800 men).

Age is another important variable. Under the same law, a larger proportion of older people had their applications approved than is normally found among the participants of educational leave. 23% were over the age of 40, which still leaves a large majority among the younger age groups (52% were aged 30-39). Where the case studies did make some mention of the age of participants, it is rare to find any over 40 and most fall within the 25-40 range. Within the wider context of recurrent education, therefore, attention will have to be given to the likelihood of intergenerational differences being exacerbated rather than diminished.

Access to leave is also restricted at the other end of the age spectrum. To some extent, employers will base their calculations on the premise that younger workers will realize 'returns' over a longer period, but this depends on their future stability, and the very youngest, just starting their careers, may frequently be viewed as 'high risk'. Equally, these patterns may be reinforced on the demand as well as the supply side of the equation, with older workers particularly reluctant to present themselves as candidates for leave.

The tendency of the more highly educated to be those who benefit most from educational leave is in no small degree simply another way of expressing the differences among the levels of the job hierarchy - semi- and unskilled workers, for instance, are the least likely to have completed higher stages of initial education. It will not be a perfect reflection, however, and it would be interesting to know the educational profiles of workers in the same occupational group and levels in the job hierarchy who participated in educational leave. Both the German and US reports mentioned this 'echo' effect and figures from Germany indicate that only 15% of the participants in 1972, benefiting under the Labour Promotion Act, had not completed an apprenticeship or some equivalent or higher qualification prior to 1972. If we refer back to the distinction between arrangements where participation is determined largely by the employer and those where a fair element of choice is exercised by the employee, the latter case raises again the question of stimulating demand among less educated workers. There may be powerful meritocratic selection processes which discourage participation - in Smederevo, for example, whilst the 'competitions' are formally very open, preference is given to those with higher attainments in previous studies and in the enterprise tests of 'capabilities'. This does not exclude the possibility of the lower educated workers participating in courses, particularly as assessments of work performance are also used in selection, but it clearly reinforces the 'echo' effect. Depending on the credence given to the work of those like Berg,* the

* Ivar Berg, Education and Jobs: The Great Training Robbery, New York, 1970.

screening function of certificates and education could be extended to include the selection processes of educational leave and training in the enterprise. Again, in the wider context of recurrent education, the 'echo' effect is clearly a crucial matter, insofar as it works against the aims of equity which form such an important part of its objectives.

Finally, positive discrimination in favour of disadvantaged groups is not widespread, but reference should be made to the New York hospitals where blacks, hispanics, and unskilled workers are given preferential consideration, and to Swedish efforts (see Section 3b). It is important to note, however, that federal funds and backing lie behind these measures.

SECTION 4: EVALUATION

Even if it is often difficult to assess the exact cost to a firm of its total training effort, there is no doubt that in all the enterprises included in this study it is very substantial. An obvious question for enterprises is therefore: 'It is worth it?' and the most apt answer must be: 'We think it is, but to be honest we can't prove it'. Most of the leave and training provided being directly job-related, some criteria of its success in meeting enterprise objectives are more quantifiable than others - increased productivity or reduced turnover of personnel - but there are so many intervening factors that it is extremely difficult to pinpoint the contribution of training, even to these. Other effects, such as possibly improved industrial relations, are equally important to the enterprise but present enormous problems of specification and measurement. A comprehensive evaluation of the effects on the enterprise may include many factors which are at present given little consideration.

When one turns to the consequences for the individual, whilst in some respects the impact may be clearer (e.g. immediate promotion), any estimation of the effect in career terms would require longitudinal data which is very rarely available. In fact, the Post Office Engineering Workers Union in the UK is one of the rare exceptions and has been looking at the effects of its own training over a number of years. This is significant also in that it represents one of very few attempts at evaluation by a non-employer group. Moreover, evaluations are likely to concentrate on those effects that are most visible, whereas more diffuse consequences may be equally pertinent. In Section 5 we give some attention to effects of leave and training for individuals but it must be stressed that this hardly amounts to a systematic analysis and much of the basic gathering of data remains yet to be done.

Moreover, the above points refer only to the impact as such; when it comes to estimating value for money and time the difficulties are greatly increased. One has to think not merely of how many resources to devote to training and the scale of the leave programme, but what sort of training it should be, who should receive it and so on. This involves both a variety of interests and objectives among the different parties and a conception of alternative arrangements to existing provision. In any event, it is clear that there is unlikely to be a single coherent set of objectives that commands the assent of all the parties involved. Thus whilst unions, management and the public authorities may agree that a certain minimum volume of training should be maintained, they may differ considerably on its nature and distribution. In this section we confine ourselves mainly to an account of the evaluation of educational leave made by the enterprise studies, and our observations on the state of information in Chapter II provides a backcloth to this investigation. With the focus of our case studies, little can be said about, for example, union evaluation of their own or enterprise education nor can we provide specific answers to the questions a firm's evaluation may seek to answer.

First, then, how do firms go about assessing the value of the education received. In some cases the answer is simple: they don't. In the case of the Kaiser hospitals, there is no feedback on the courses though the workers 'occasionally file unsolicited reports'; there is a feeling that the worker makes progress and the employer somehow benefits. This is partly justified on the grounds that productivity increases would be hard to measure in hospital work and this argument has a certain weight, but in the New York League of Voluntary Hospitals (District 1199) evaluation is carried out systematically and formally, if not comprehensively, with the following factors being studied: the drop-out rate on the courses (found to be low) the consequent upgrading of students, and student opinion. However, the nature of the leave is presumably very important here - in the Kaiser hospitals the leave is short, the job is not left and the participation rates are rather low. It is not so surprising that in the New York League, where the courses are very much more substantial, that there are systematic attempts at evaluation. The Hospital Corporation of New York, where there is a similar leave programme to the League, likewise assesses the courses using entry and exit examinations together with informal feedback from supervisors. Thus one can emphasize the relation between the extent of leave provisions and the resources and sophistication devoted to its evaluation by the enterprise, remembering that such evaluation does represent a cost to the firm.

The US case study furnishes other examples illustrating the links between the purposes and nature of the leave programmes and the extent of their evaluation. At the Kimberly Clark Corporation where courses are taken mainly in employee time, in outside institutions, and with a wide degree of choice left to the employee, evaluation amounts largely

to the reporting of who it is that use different kinds of education. In the Postal Services, on the other hand, educational leave was explicitly developed to improve the productivity of the enterprise and here extensive evaluation is undertaken, with a separate branch existing for this purpose at the Postal Service Training and Development Institute. Pre- and post-training tests are used here also (in particular to compare results with student expectations) and supervisors evaluate skills gained from training on return to work. GEC Marconi in the UK have extended this further with an 'Effectiveness of Training Survey' three, six and nine months after completion of courses (from which the conclusion was drawn that the courses could be shorter).

Given the enterprise-defined purpose of the leave in the Postal Services it is again not surprising to find that the criterion of improved productivity is prominent and, unlike other US examples, it utilizes cost-benefit techniques. A series of quantitative analyses carried out cross-sectionally over the last five years show positive partial relationships between management training input and physical measures of service output, and the rate of return on training investment is calculated in excess of 12 : 1. On the whole, though, use of rate-of-return calculations by firms is rare: they do not see it as a generally helpful or useful instrument in judging the worth of their courses.

We have, then, commented on the range of evaluative instruments that are variously applied. This has not, however, entailed any discussion of their appropriateness to the different programmes to which they are applied, and it should indeed be pointed out that differing contexts and differing objectives may well call for correspondingly catholic approaches to evaluation. To compare the DBP with the US Postal Services for instance, the different German Labour context sees union resistance to examinations and evaluations, which are applied only for cases of promotion and the courses taken by future trainers. A similar resistance is seen at Bayer where management tend to avoid assessment that might appear as a form of disciplinary control over employees. Equally, at British Leyland, ICI and the Post Office in the UK there is resistance to job analysis and evaluation among the craft unions and at operator and supervisor level.

It may be that this tends to reinforce the inequities of provision we have already seen. At ICI, in comparison with the craft levels, the salaried staff have a formal 'but open' assessment in terms of which individual training needs and types of courses can be built up. To minimise the appearance of disciplinary control, Bayer concentrate their evaluation on full-time education and training for 'groups of strategic importance', which similarly may result in improving the provision in those areas where it is already best developed. At the same time, the nature of the criteria used by the enterprise at different levels in the hierarchy may vary significantly. For those in low skill and routine work, apart from the low priority frequently given to their training, evaluation may involve a fairly narrow set of criteria and

where enhanced productivity is adopted it may be conceived of in a more identifiable and narrow sense than for those above them in the hierarchy. Training provision for them thus becomes very vulnerable unless their performance in a small number of isolatable ways is clearly improved. The comparative difficulty reported for the evaluation of managerial training is therefore not merely one of a technical nature but stems also from the qualitative differences in work content and the range of benefits envisaged from the training. British Leyland and GEC both reported how difficult it is to evaluate management training (though the US Postal Service offered quantitative estimates of costs and benefits) and such a situation may be more protective to the individuals involved.

This is not to suggest simple or universal relationships, nor that the notion of increased output dominates evaluation. Attention may be focused less on the tangible effects on the individual than on the courses themselves and we have seen that several of the instruments used (e.g. reports on the courses by students) refer to this area. The Telecommunications section of the UK Post Office, without employing a systematic monitoring programme, uses a range of methods such as Area Training Officers' reports to assess the courses, and they are regularly revised in the light of new needs. Bayer's central educational department has developed not just a systematic assessment of courses, where the participants judge them according to their expectations and experiences, but an evaluation of speakers as well. An unusual criterion mentioned at British Leyland was enhanced appreciation of safety regulations.

As is to be expected, the Italian experience is idiosyncratic since most of the measures applicable elsewhere, such as increased productivity, are not seen as relevant. Union control, and the reliance on public authority provision, means that the enterprises make little or no attempt at evaluation. There is, in fact, a curious polarization: on the one hand, the very concrete achievement of the basic qualification, and on the other the rather nebulous though no less highly valued effect of increased articulacy and improved understanding of the work processes or (in the case of hospital workers) of the concept of health in society. As for the former, there is general satisfaction with very low drop-out rates recorded in comparison with traditional examinees especially once the applicants had actually begun the course. The latter shades into political notions of cultural stimuli, and a collective sentiment of strengthened solidarity.

Yugoslavia produced the most precise estimates of the benefits: at Smederevo the personnel and education department appears to coordinate planning, needs, organisation and evaluation more extensively than we have seen in the other case study examples. With a control group studied for the purpose of comparison, the following outputs were evaluated: productivity, breakage of tools, product quality, injury rate and self-reliance in work. Productivity was estimated as increasing by between 9.8% and 24.9% and correlations were observed between

the proportion of workers undergoing education and reduction in the numbers of injuries and of wastage and damage. The overall estimate was that the costs of the study leave were on average recouped between 8 and 19 months after the worker's return. Productivity gains on the railways are naturally harder to assess and precise figures were not arrived at, though managers estimate it as high as 20-30%.

We have already noted the difficulty of tracing qualitative and diffuse effects and what emerges is the importance not just of the sophistication and resources devoted to assessment but the criteria used in that assessment. Two further points of interest emerge from the Yugoslav study which go beyond the areas of relevance so far observed. First, an evaluation is made of the impact of education on the worker's participation in decision-making both quantitatively (number of times he appears) and qualitatively (different weights being given to the asking of questions, the answering of questions, comments and the formulation of proposals). An index of this 'social efficiency of education' has been compiled, but its results were not reported.

The second point concerns the positive value accorded to the influence of study participation by workers on their children's educational achievement. Here again no figures are available but interviews conducted with the headmasters of schools attended by the children of metalworkers, with fellows of the Pedagogical Institute and with educational administrators produced a strong consensus that raising the parents' educational level stimulates their interest in school, improves relations between the school and the community and increases their children's achievement. In view of the increasing evidence demonstrating the relative influence of parental attitudes (and not just their socio-economic position) on children's educational attainment,* this effect could attain significant importance. Whilst we are not suggesting that enterprises themselves are usually in a position to investigate this kind of benefit, such externalities have to be reckoned in a full evaluation of training and educational leave.

Evaluation should be seen in the context of the organisation of the enterprise's general decision-making on training issues. An interesting feature of the Siemens structure is the autonomy of the different units who send personnel to the training unit and their consequent critical alertness. Since the individual units bear the costs of the training, rather than these being assumed by the company as a whole, and have to make sure that the skills acquired are relevant (especially to new technologies) they adopt to an unusual degree a customer role and the training unit has to see itself as a service department, with a good deal of direct feedback. The division of responsibilities, and the

* See, for example, J.W.B. Douglas, The Home and the School, London, 1964; S. Wiseman, The Manchester Survey, Appendix 9, Plowden Report II. Central Advisory Council for Education (England) (1967), Children and Their Primary Schools (Plowden Report) London, HMSO.

effect this has, are similar at ICI and GEC. Yet the changing of training costs to the individual units can impede the development and application of a coherent overall training plan, and despite this internal pressure toward effectiveness and efficiency, evaluation at Siemens seems to rest mainly on a positive belief in different kinds of education and training. We can say little from the case studies on the effects of assessments and on the planning of training and the ways in which such planning is coordinated with overall strategies within the enterprise. Future questions might be 'What is the relation between evaluation and enterprise planning?' or, more specifically, for instance, 'Does the adoption by firms of a short-term perspective in their planning of training programmes sometimes conflict with the criteria used for assessing their effectiveness?'

This concentration on the evaluation of the courses themselves, or of their effects on individuals or groups of workers (rather than the relation of this to overall policy, or evaluation of the training policy as a whole) partly reflects the state of organisation within the enterprise. Such overall thinking is not entirely lacking, however, and here we depart from our focus on the firm's own efforts. In the UK, the evolution of the Industrial Training Boards since 1964 has met with a mixed reaction from management and the role of ITBs themselves differs widely between industrial sectors. However, their responsibility has been to oversee arrangements for training within their sector and to assess the training given by each company. The Chemical and Allied Products ITB conducts fairly intensive reviews during 5-day studies at selected works which ICI management see as generally useful. And the Engineering ITB, with GEC within its orbit, backs its evaluation with a more active checking system, sending advisors into the firms to ensure certain minimal standards. So whereas the ITBs may not appear to all concerned to work ideally, they do provide an outside and to some extent comprehensive source of assessment, and most companies in the case study would agree that at the very least they stimulated thinking and a more systematic planning of training.

In conclusion, then, it can be seen that attitudes to evaluation vary from total abstention to detailed attempts. Behind all this is a certain confidence - whether or not it is supported by hard evidence - in the positive value of training. Differing too are the criteria selected as relevant to the evaluation and it would be interesting to know how this choice affects the workers involved. But as we saw, we have yet to map in greater detail the responsiveness of training policy to evaluation and feedback.

This discussion has naturally been phrased in terms of benefits to individuals or from individual courses as viewed by the enterprises. How others view the costs and benefits, and the criteria they would use in assessment has not been touched. Problems in evaluation obviously multiply if one looks at an enterprise's overall training effort, and even more so if one moves to industry level (and astronomically if one

moves to national level). This is not the place to embark on a full-scale discussion of the methodology of evaluation, but it is worth remarking that conventional rate-of-return calculations can have only a limited validity in this field, both at the level of the enterprise and at the macro-economic level. In the first place, they commonly fail to separate out the consequences of certification and placement itself.* More generally, they do not evaluate either the externalities or the contribution made towards broader objectives such as that of improving the position of the disadvantaged, and although caveats to this effect are usually entered, the precision of their quantified conclusions often lends them a weight which may be out of proportion to their relative validity.

Broadening the approach is crucial in at least one particular respect, namely if one wishes to link training policy with overall employment and investment policy. A particular training course may yield good or bad dividends (for the firm, the individual, or socially) but a true evaluation must set that against the wider gains or losses. This involves taking into account not only displacement and vacuum effects,** but also the relation of training to the impact of new technology. There are also, of course, still broader societal objectives; these we cannot deal with in depth, but we do discuss them in Chapter IV.

SECTION 5: THE IMPLICATIONS FOR CAREER PATTERNS

In this section we examine the links between educational leave and career advancement. In this context, the validation and award of credit for leave and training is looked at, raising also the question of internal and external recognition of courses and certificates. Because of our concentration on the enterprise, we cannot accurately gauge the possibilities opened up through leave in the wider labour market; a more general discussion of segmentation, internal and external labour markets does, however, follow in Chapter IV. The existence of vacancies and openings for promotion, and the scale of leave provision itself, are

* See, The Evaluation of Vocational Training, Commission of the European Communities, Brussels, 1975.

** Displacement is "the process whereby trainees obtain jobs which could have been filled by untrained people", and the vacuum effect is that "whereby other members of the labour force may be taken into jobs vacated by trainees or complementary to those newly occupied by the trainees". The Evaluation of Vocational Training, p. 118. The majority of the cases dealt with in this study have little to do directly with such effects, since the alternation does not involve leaving one's job, but there are likely to be some indirect consequences of this nature.

greatly affected by the economic climate, booms and recessions - this we turn to in the latter part of this section. Two initial points need to be made: firstly, that focusing on these kinds of consequences naturally emphasizes vocational, job-related leave, an approach which is justified by the predominance of leave of that sort, whilst in no way denying that other important considerations exist. Secondly there is a clearly individualistic flavour in that the major benefits of leave are seen in the enhancement of individual career prospects. In future, attention will have to be given to the broader collective implications of the links between educational leave and position in the job hierarchy.

Direct and Indirect Links with Promotion Paths

Some of the training and educational leave is explicitly intended to equip the individual with the skills for a new job, though there is variation in the degree to which completion of the course is itself a guarantee of promotion. Generally this is likely to involve the award of some form of credential, whether by the firm or by an outside body. In other cases, the purpose is to update knowledge and skills or to improve efficiency on the job, and its links to promotion may be only indirect, if they exist at all. Central to the question of promotion is the degree of correspondence between qualifications and acquisition of skills* and the hierarchy of the job structure.

In Yugoslavia there appears to be an explicit and well-defined correspondence between educational attainment and occupational grade at all levels, strictly applied except when a shortage of formally qualified people has allowed a worker to rise to a position normally reserved for those with higher qualifications. Even when this occurs, such workers are among the highest priority in the selection for leave and in the Belgrade Railways someone without the appropriate qualifications who is unwilling to undertake the training is reassigned to a lower post. Such a matching of posts to qualifications is not yet fully elaborated in the Railways but the aim is to develop it in order to ensure a very tight 'fit' between the two. An interesting distinction is made in the Yugoslav enterprises: whilst the aim is to make education and qualifications the requirement for assignment to posts, whether this entails increased income depends very much on assessments of the individual's performance in work. The Railways particularly appear to be using these different criteria to separate the two aspects of promotion. This has been the cause of a certain amount of dissatisfaction; in Smederevo

* Noting that the relation of education and certificates to skills, and the function of credentials, is the subject of current widespread debate (see, for example, Ivar Berg, Education and Jobs: the Great Training Robbery, 1970; Lester Thurow, Education and Economic Equality, Public Interest 66 (Summer 1972); Samuel Bowles, Unequal Education and the Reproduction of the Social Division of Labour, in Schooling in a Corporate Society (M. Carnoy (ed) 1972); Herbert Gintis, Education, Technology and Characteristics of Worker Productivity, American Economic Reviews, 61, No. 2, May 1971.

there are demands for the automatic increase of income with the acquisition of certificates. Clearly tying income to work performance in this way calls for a fairly elaborate system of evaluation.

The DBP appears to operate a very strict correspondence between qualifications and position in the job hierarchy, similar to that described for Yugoslavia, but there are important differences between the two. One such difference (there are others, perhaps more important, which we return to below) concerns the certainty of promotion following the acquisition of a required certificate; whilst someone in the DBP may complete the necessary studies (perhaps through the DPG Fachschule), subsequent promotion is strictly controlled by the company and is dependent upon vacancies. The point is made explicitly for Siemens - individual initiatives towards upward mobility through education may come to little and be doomed to disappointment if undertaken without regard for company openings. In other words, completion of a given course is a necessary but not sufficient condition for subsequent promotion. In Yugoslavia the control appears to be exercized at an earlier stage, in the decision that a worker will undergo a particular course; once completed, however, it provides the effective guarantee of assignment to a post felt to be appropriate to that qualification.

The New York and Italian hospitals are similar to the DBP here; the aim among the nurses is very clearly to gain promotion and the certificate acquired is a necessary part of that advancement. In the Hospital Corporation of New York, for instance, a nurse's aide may use his or her educational leave to become a licensed practical nurse, with a consequent and significant rise in salary from $ 8,825 to $ 11,000 over a 9-month period. However, the credential is necessary but not always sufficient for promotion - though expectations are usually fulfilled, this is not guaranteed. As we see in the latter part of the section, recessions and the disappearance of labour shortages exercises a crucial influence on the promotion of qualified staff.

In several of the UK enterprises and the US Postal Services the position is somewhat different. Here educational leave and training often follow promotion in order to equip the employee with the skills for his new post. The correspondence between training and advancement, though very tight in these cases, is as if reversed and this system is particularly vulnerable to changes in the economic climate. Much of the training in the US and the UK is not directly linked to promotion, however. Even in the US Postal Services, where the training is largely career-oriented and aimed at enabling workers to perform better in higher jobs, advancement is not tied to education directly. For the Californian hospitals and the Kimberley Clark Corporation, promotion is not the objective of the leave periods nor is it expected, though individuals' prospects are enhanced. That the enterprises with very short courses and periods of absence from work are also those where career enhancement is not the objective is hardly coincidental - the skills learnt during seminars and 2- or 3-day courses are normally intended

to improve some specific aspect of the current job rather than act as a stepping stone in the career. The exception to this pattern in the Kaiser hospitals are the part-time programmes, given in-house and during working hours in the Southern California hospital, which assist nurses to gain the qualifications they need for higher posts.

The Relevance of Certification

Differences between the DBP and the Yugoslav firms in the nature of the correspondence between qualifications and position in the job hierarchy also raise the large question of certification and the distinction between internally and externally awarded certificates. Whereas both have a tight fit between qualifications and position in the hierarchy, in the DBP the qualifications generally take the form of publicly recognized certification, since the DBP is a public service and hence conforms to federally determined regulations. On the other hand, the Smederevo Metalworks, for instance, being a self-contained entity in the Yugoslav tradition, decides on its own educational policy and hence has more freedom in establishing an internally justified correspondence between educational attainment and occupational position. Roughly midway between this and the centrally determined public service case is the example of the hospital and health care workers in New York City: the education taken while on leave is intended solely to provide the skills and credentials required to do a new job so that it is closely related to a specific job; but the educational provision and its validation are not wholly determined by the individual enterprise (in this case, the hospital) but are influenced by external factors (other hospitals, medical councils, federal legislation, etc.).

But there are further significant implications of the differences beyond the question of where decisions about qualifications are taken. Where the courses, qualifications and correspondence with posts in the firm are internally determined, a tight 'fit' between qualifications and jobs means that educational leave is closely associated with promotion. Where, on the other hand, the qualifications required are public and external to the firm, a tight fit may equally mean that the qualified staff are brought in from outside as direct entrants to the firm and that educational leave for those already employed has less weight as an avenue for promotion. If the UK Post Office requires a specified number of GCEs for particular posts, this may mean that Post Office workers take the examinations in order to proceed to the higher job or someone outside the company already possessing them will be chosen. This is to indicate that the correspondence between qualifications and position in the hierarchy, even if it is strong, is only one of the important factors in the relation between educational leave and promotion. Other factors

such as the degree of reliance on externally awarded qualifications can exert considerable influence. *

The Yugoslav report refers to this when it mentions the problems arising from the lower degree of public currency enjoyed by internally awarded diplomas compared with those in the formal education system. But it also says that changes are on the way which are intended to remove these differences involving a re-evaluation of current certification procedures so that internally awarded diplomas will be valid in enterprises throughout the country. It is not reported how this is to be achieved - whether, for instance, it is to be through a process of public external moderation. Thus the possession of a universally recognized qualification may well enhance the worker's mobility in the wider labour market. In Italy, the completion of basic schooling, for all its 'general education' character, is a necessary condition for entry into many occupations and the educational leave which enables this must therefore be seen in relation to the acquisition of this formal qualification. (The trades unions have rejected any suggestion that the content of the courses should be reduced to allow easier acquisition of the diploma, being aware of the devaluation of the award which would rapidly ensue.) On the other hand, within large enterprises that have developed their own courses and awards, the internal diplomas may enjoy greater currency with the firm.

The rival merits of internal and external certification are raised explicitly in the case of Bayer, which has recently introduced some internal diplomas equivalent to recognized trade qualifications. These are designed, laudably, for workers who have reached a craft level of skill but who are reluctant, for reasons well known to those in the adult education field, to present themselves for formal examination. It is reported that the members of the works council hold divergent views: some feel that this opens up new opportunities which outweigh the disadvantage of an increased dependence on the company; others feel that it inhibits people still further from applying for external examinations.

The Impact of Economic Fluctuations

The picture is not, however, a static one. Workers are not encouraged to acquire new skills unless there is a definite prospect of them being able to use these skills in the immediate future and hence the granting of leave for promotion purposes tends to be cyclical as the enterprise is affected by changes in the economy. Some firms will, of course, be better protected from these cycles than others. This cyclical effect has implications both at the enterprise level and at the macro-economic level; as well as individual companies needing to cushion

* One should add that the links between educational leave and promotion vary both between occupational levels (being generally looser from the level of skilled worker upwards) and across departments (they may be tighter, for example, in technical areas than in clerical ones).

themselves against a recession and prepare themselves for the ensuing upturn, national manpower policies have to smooth out the crests and troughs. There is also the increasingly important issue of structural shifts in the economy, involving the decline of some industries and the growth of others, and the employment implications of these movements. We cannot, however, embark on a global discussion of economic trends, but restrict ourselves to looking at the implications for educational leave.

In the enterprises we are looking at, the recent recession had immediate effects on educational leave, both in terms of the demand for trained personnel and in the amount of available funds. In Siemens and Bayer, there was a diminution of training opportunities with the restriction of the firm's growth - in Bayer the number of daytime courses fell from 450 to 337 between 1974 and 1975 and in the same period evening courses were similarly reduced from 183 to 105. The DBP sharply reduced its education capacity; for example, the whole scheme of assistance to the 'Fachoberschüler' and 'Fachhochschulstudenten' was cancelled. Throughout Germany, the subsistence allowances under the Labour Promotion Act were reduced from 68% of former income to 58%, except in the case of semi- and unskilled workers. The stagnation of promotion prospects and changes in the possibility or guarantee of re-employment after leave affect demand as well as supply - thus the DPG Fachschule activities were also reduced, with 35,000 participating in 1975 compared with 45,000 in 1974.

The altered prospects of re-employment were an important aspect of the recession. In 1975/76 the DBP employed only half its 'Fachhochschulen' leavers, and the technicians and engineers at Bayer taking full-time leave under the Labour Promotion Act, instead of receiving preferential re-employment in new posts, sometimes could not even return to their old jobs. In 1975, and again in 1976, the DBP recruited 1,800 technical telecommunications apprentices who might not find jobs in the trade. But here is an example of the exercise of the responsibility of a major public service (the DBP is the biggest employer in the German civilian sector) to use its training and employment policy as a counter-cyclical instrument and to train personnel even when the prospects of subsequent employment are slight. The German report refers to the union criticizing DBP management for not playing a still more active role in this respect. Some of the UK enterprises have maintained apprenticeship training even where it is not always clear that they can be subsequently employed. Yet there are advantages to the company as well as to a wider social public of awareness of the counter-cyclical use of training; planning for short-term needs which leads to curtailments can leave the company with serious shortages later on and training then has to be undertaken to rapidly make amends. We return to this question in our discussion of the role of educational leave in manpower policy (Chapter IV).

In the UK, economic difficulties have struck hard at training opportunities and some enterprises have had to halve the number of training apprenticeships offered each year. First to go are the more general types of educational course,* but just as in Germany the specific training is also rapidly affected. As well as drastically reduced initial intakes, promotion prospects have been significantly impaired and concomitant training provision reduced accordingly. We have noted that the short-term nature of many of the training plans is one factor that magnifies the cyclical changes; the degree of centralization of decision-making may also be relevant. In ICI, the decentralization means that decisions are particularly reactive to the local situation, whereas a more centralized locus of decision-making may be able to balance shortages in some areas against relative surpluses in others, and also to adopt a longer time perspective of its needs. The possibility of the quickening substitution of capital for labour during slump periods, which has happened in some cases, has further clear implications for educational leave and is taken up in the next chapter.

The reduction of promotion prospects and its effect on educational leave and training points up the dilemma: either one demands that in order for the newly acquired skills to be put to use training should entail promotion - in which case, if promotion cannot be made available, training is also abandoned. Or one accepts that training does not necessarily give the right to promotion, in which case one insulates training to some degree from economic fluctuations, but reduces its potential as a means of individual career development.

Earlier in the chapter the distinction was made between extended and restricted educational leave: the relatively costly extended leave programmes are among the hardest hit during periods of recession. We have seen that the DBP had abandoned part of this kind of leave entirely in 1975, and in the US, whereas the Kaiser hospitals and the Postal Services report no great difficulties in the last few years, the New York hospitals have serious doubts that their programmes can continue in their present form in the face of rising costs. Indeed, in the League of Voluntary Hospitals, the nursing programme has been stopped now that there is a surplus of trained personnel. But this may be due to factors other than the twists and turns of the economy - if a major training programme has been under way for several years they may have anyway reached a situation of surplus rather than shortage.

Thus the question of shortage and surplus goes beyond economic cycles. The constant growth and evolution in the Smederevo Metalworks has meant that new posts are constantly becoming available and hence that so far there have been few problems in maintaining the level of educational leave provision without impairing the entitlement of the

* Where expenditure on training is mandatory, as in France, this may not be the case; since in recession periods it is less clear exactly where training is needed, narrowly vocational training may be cut back and the obligatory expenditure made on more general education and training.

newly trained worker to a suitable post. But if and when this evolution falters, what will be the consequences for educational leave? The reference we made earlier to structural shifts was very cursory but it points to a further aspect of dependence of training and career opportunities on broader economic developments.

IV

THE BROADER CONTEXT

Until now, there has been relatively little attempt in this report to relate the policies pursued by the enterprises for the training of their employees to other policy areas, such as the enterprise's investment plans or the public authorities' initiatives in the training field. Moreover, however dubious the line between vocational and non-vocational education may be, there is no doubt that alternative between work and education is so far, in the vast majority of cases, very closely tied to job requirements, and this has caused the emphasis of the case studies to be on training policy in its orthodox sense. One implication of this may appear to be that educational leave is merely a regularized and perhaps slightly more structured form of vocational training. In this chapter, therefore, we look beyond the current empirical situation and consider ways in which educational leave may complement other policies, and more particularly possible lines of development that would enable it to be more than an instrument of training. We look at the relation of educational leave to the evolution of the internal labour market, and at the role it may play in the implementation of qualitative changes in the world of work. There is finally some specific discussion of how public authorities may influence its character and impact.

SECTION 1: THE PARAMETERS OF EDUCATIONAL LEAVE: EXTERNAL CONSTRAINTS AND INTERNAL FACTORS

In spite of the emergence of educational leave as one of the most significant current developments towards a system of recurrent education, it is as well to begin with a recognition of its limitations. We have already noted how the volume of training and its effectiveness in further career possibilities are affected by general economic trends. If a firm is expanding and new positions opening up at various levels within it, there are relatively few problems in maintaining or enlarging its training effort, and employees are less likely to be disappointed either in applying for leave or in benefiting from it in terms of promotion or greater responsibility. In times of stringency, on the other hand,

the converse generally holds. This signifies that as yet the use of training as a counter-cyclical instrument is underdeveloped. Factors such as the relative prices of capital and labour, the volume and nature of investment, and technological innovation largely determine the scope for educational leave, even if the last-named is itself influenced by training policy (see Section 3).

There is, in short, a dependence on macro-economic factors (involving the growth of certain sectors and the diminution of others, and with implications for the overall occupational structure and the demand for skills) which educational leave schemes, however enthusiastically promoted, are on their own relatively powerless to influence. Moreover, if one turns to the effect of education in general, there is an increasing body of evidence which suggests that the impact of education in isolation is more limited than was once believed. * We are not here following the swing of the pendulum and under-playing the value and effectiveness of education, but merely recognizing that in the political hurly-burly, where different measures jostle and unbalance (as well as occasionally reinforcing) each other, educational leave has no sharper elbows than many other single policy instruments. The argument that follows derives from the apparently trite observation that education's impact is greatly multiplied if its relation to impinging circumstances is carefully considered, and its provision designed accordingly.

The effectiveness of educational leave will also depend heavily on its coherence with other internal enterprise policies. A particularly clear example is the effect of placement and personnel policy on the value to the individual of educational leave, already referred to more than once. In Chapter II we raised the issue of control, and this is again relevant here. Even if, for example, access to educational leave is more equitably distributed, the value of this for the individual is likely to be limited if it is not accompanied by some agreement on the recognition of what has been learnt and its subsequent utilization. ** If one looks, for the moment, at the merely instrumental function of educational leave as a means for career development, progress made in the provision of educational opportunity may be nullified if those responsible for the subsequent placement of the students, and for decisions affecting the general career structure within the company, are not disposed to shape their policies in concert with this instrumental function of the educational reform.

* See C. Jencks, Inequality, New York, 1972. J. Coleman, Equality of Educational Opportunity, Washington, 1966. M. Carnoy and H. Levin, The Limits of Educational Reform, New York, 1976.

** A survey of the Keio school of business administration in Japan, catering for professional people, shows that only 16% of those released for study benefited from it in terms of promotion or increased salary, the rest returning to their former posts without any change. (See CERI/RE/77.4, OECD, mimeographed document).

Change in the organisation and structure of work, which we discuss in Section 3, constitutes another example of interaction between educational and other reforms. In this case, however, there is a greater degree of mutual influence - that is to say, education on its own cannot alter the workplace organisation, but, equally, moves towards job enrichment, or more ambitiously towards some form of industrial democracy, require adequate educational provision if they are not to be mere window-dressing or purely formal. This is true at all occupational levels, though in significantly different ways. On the one hand, for an assembly-line worker the switch to a modular production system, for example, will oblige him to acquire new skills which will be not only technical but also 'social' if group cooperation is to be achieved; and a move towards genuine participation will demand a whole set of different skills, ranging perhaps from greater literacy and numeracy to a better appreciation of the firm's socio-economic role and responsibilities. On the other hand, it has been repeatedly demonstrated that major resistance to innovations in work organisation comes from middle management and supervisors, who see themselves as the major losers in terms of authority and status.* If these groups are given no opportunity to assess for themselves the value of the proposed reforms, and to prepare themselves for their new role, they are the more likely to fall back on non-cooperative or even obstructive attitudes.

Educational planning for workplace reform must therefore look to both sides of the existing authority structure. And whilst it is true that such reform itself stimulates educational demand, it should not be forgotten that the way in which such demand is met, if it is met, is itself a function of the relative strengths of the social partners, and will consequently form the subject of negotiation, in the same way as the reform proposals themselves. In sum, if greater participation is the goal, all enterprise levels must be given the chance to prepare themselves for it, and learning opportunities are therefore a necessary condition for successful innovation in this field; on the other hand, obviously, educating the workforce for greater responsibility and participation will not of itself induce the reforms, and may instead raise aspirations which are not fulfilled.

Post-training placement and workplace democratization are only two of the areas in which education has a very obvious part to play, but one whose actual effect is determined by its relation to other elements. The effectiveness of training will be generally influenced by its coordination with other policies within the enterprise, which can be looked at under three headings. The first is the geographical location of the relevant decision-making unit. For instance, the UK report goes into some detail concerning the problems posed by a decentralization of training responsibilities, and we have already mentioned the way in

* See A. Crombie, Post-industrialism and the world of work, Canberra, 1976; Jan Kronlund, Internal Industrial Environment: Summary report, IND/MAS/JWP(76)2, especially p. 19. (OECD, mimeographed document). F. Emery and E. Thorsrud, Form and Content in Industrial Democracy, London, 1969.

which the Bayer structure of autonomous units, of which the training unit is one, can cause each unit to take a rather isolated view of training at the expense of a coherent overall company policy. Put summarily, if decisions on training are taken at branch level they may be more responsive to immediate local needs, but may also run counter to other trends within the firm whose direction depends on decisions taken nearer the centre.

The second heading is hierarchy. This often coincides with the first, in that the more central the locus of decision, the higher in the hierarchy its agent is likely to be. It is nevertheless worth distinguishing, at least for the purposes of analysis, the different hierarchical levels at which different decisions are taken, and reflecting on the degree to which they mesh one with another. In particular, these will reveal the margin of manœuvre available to whoever has responsibility for the distribution of educational opportunity.

The third aspect is the temporal one. Given that very few courses last more than a few months, it may well appear that training policy is highly adaptable, and can be rapidly adjusted to meet the twists and turns of the enterprise's evolution. Granted that flexibility is a virtue, it should nevertheless be pointed out that a proper and coherent scheme will have a longer time-span than that of individual courses. Training plans that are reasonable and effective at their time of conception can founder if on the one hand their financial base is knocked away and on the other if the rate of growth or occupational change on which they were constructed is suddenly changed. It is perhaps not so much that training plans should be made for exactly the same period as investment and other plans, but rather that a deliberate effort should be made to keep them in phase -- but in how many firms is this the case?

This sort of calculation is obliged to take into account factors that go beyond the internal workings of the firm, and this brings us back to the issues discussed at the beginning of this section. For instance, the firm's future plans may envisage the shedding of a certain proportion of its workforce, as well as the retraining of others. In such a case, union cooperation is likely to be forthcoming, and social responsibilities discharged, only if adequate provision is made for those whose jobs are supposed to disappear. It is surely more satisfactory to enable them to gain other employment than to think only in terms of financial recompense, and at this point enterprise policy interacts very closely with national policy in determining a reasonable functioning of the external labour market.

The potential of educational leave for playing a part in achieving enterprise and national objectives is, then, subject to a variety of influences, internal and external. Perhaps the drama metaphor (of 'taking a part') is more literally applicable here than usual: the individual actor's part is unintelligible without the intervening speeches of his stage partners. Even the most powerful soliloquoy makes more sense when set in its dramatic context, and education's significance

is similarly determined by the constituent elements of its socio-economic context.

SECTION 2: EDUCATIONAL LEAVE AND THE SEGMENTATION OF THE LABOUR MARKET

This section looks at the influence on educational leave exerted by the way the labour market is segmented as well as the impact the former may have on the latter. Particular attention is paid to the growth of internal labour markets, where promotion is largely from within the firm and which are difficult to enter other than via a very restricted number of ports of entry, to the way in which the benefits of inclusion in those markets are distributed, and to the impact of exclusion from them.

The labour market is divided by a number of barriers which prevent workers from moving with perfect freedom from one sector to another. Some of these barriers are blatantly discriminatory, such as those of colour or sex, others exist for more subtle reasons and have more justification. * The theory of labour market segmentation is based on the observation that different categories of workers face objectively different labour market situations which heavily influence their career patterns; these divisions mean that rewards are not distributed according to marginal productivity, but more as a function of institutional, social and political conditions. Thus for those in the less privileged segments, improvement of their educational level is initially less likely and in any case stands little chance on its own of enabling them to jump to another segment.

From the point of view of analysis, the key dimension is that of time. Whether or not one argues that the market is divided basically into two sectors, primary (itself subdivided into 'independent' and 'subordinate') and secondary, as is held by the dualist theory, ** or into several, segmentation theory helps us to look at the way individual careers are affected over time by the functioning of the labour market

* See for example, C. Kerr, 'The balkanization of labour markets', in ed. Bakke, Labour Mobility and Economic Opportunity, MIT 1954; B. Bluestone, 'The Tripartite Economy: Labour Markets and the Working Poor, in Poverty and Human Resources, July/August 1970; R. Flanagan, Segmented Labour Market Theories and the Analysis of Racial Discrimination, MS/M/201/405, OECD, mimeographed document (1972).

** See R. Edwards, M. Reich and C. Gordon, Labor Market Segmentation, Lexington Books, D.C. Heath Ltd., 1975, American Economic Review, May 1973. Doeringer and Piore, International Labour Markets and Manpower Analysis, Heath Lexington 1971. For a critique, see Wachter, Primary and Secondary Labour Markets: A Critique of the Dual Approach, Brookings Papers 3, 1974.

and draws us away from the conception of a given occupational s[illegible]ture into which people insert themselves. More specifically, by taking a longitudinal rather than cross-sectional approach it enables us to trace the divergence of career patterns and to view this as a continuous process, observing how the barriers which divide the labour market become, for some people, more and more insurmountable as time goes on.

Thus some jobs both are more interesting and stimulating in themselves and carry with them greater possibilities for further skill acquisition and advancement. Others are characterized by low intrinsic interest, poor career prospects and high turnover rates. Once a worker finds a place in one of the primary segments - and in general he must find a place early in this working life or not at all - his future is relatively assured (though this does not, of course, mean that he is necessarily at the top of the occupational hierarchy). An increasingly prevalent feature of these primary jobs is that they are contained within internal labour markets - that is, where companies develop structures that in terms of careers and salary favour employees who stay with the same firm, at the expense of the external labour market in which there is mobility of workers between firms. *

The growth of internal labour markets has a number of causes which it would be unnecessary to list here - increase in recruitment and severance costs, a desire to reduce turnover, spread of plant-level bargaining and so on. ** Significantly, it has meant that whereas previously mobility increased in times of full employment, with workers fancying their chances more on the external labour market, and decreased in slack periods, there is now a trend for labour to stay put even when the overall market is tight. What needs to be considered are the implications of this for training policy.

The first point is that the broad division into primary and secondary market needs, for analytic purposes, to be supplanted by a tripartite division which takes into account those outside the labour force altogether. One consequence of the growth in internal markets is that even those whose jobs are secondary in other ways may be benefiting from a certain degree of security, but that this has been gained at the expense of the prospects of those who are seeking entry into the labour force.

* It may be noted that at the top of the primary sector there are numbers of workers whose exceptionally high qualifications make them at least potentially very mobile and able to exploit the full 'width' of the external labour market. The development of internal labour markets at this level may be seen at least in part as a response to the need to provide an incentive for the highly qualified employee not to exploit his potential mobility.

** "Employers became increasingly hesitant in hiring new labour and tried to save costs by rationalizing production and substituting capital for labour wherever possible. This constituted no danger to jobholders (at least not before the recession) but it made it more difficult for new entrants to the labour force and other jobseekers to find employment." MAS/WP4(76)1 (General Report) - Unemployment Compensation and Related Employment Policy Measures (OECD, mimeographed document).

The vacancies that appear as a result of external mobility and are open to unemployed job-seekers are proportionately reduced as a relatively higher number of posts are filled by internal recruitment.* This internal recruitment is often accompanied by training, the corollary being that training opportunities tend to be restricted to those already inside the internal market. Greater security for the existing labour force, which may have been actively promoted by the unions concerned, means that companies have to make more use of training if they need to change their workforce's profile, which they could previously have achieved through external recruitment of people with the requisite new skills.

It is very difficult to estimate, other than in an impressionistic fashion, to what extent this has led to a relative increase in training in firm-specific skills, which one would expect of companies keen to retain their existing labour force. Much interesting, if tricky, work remains to be done on whether there has been a shift of allegiance from craft to company**, in other words, whether more workers now see themselves as the employee of a certain company first, and practitioner of a certain craft second. What can be suggested, however, is that certain areas of training now form the subject of more or less intensive discussion as to their dominant orientation: to company needs, to union objectives, to individual needs, or to broader socio-economic ends, where these do not all coincide. For example, there is an increasing range of workforce representatives, from safety representatives to works councillors, who need and have the right to training. Labour organisations cannot by themselves provide the resources for this, and the question therefore once more arises of who is to be responsible. Further reinforcement of the internal market may seem to require a concentration on issues specific to the company concerned, but it is a matter for debate whether this could be in the interests of all.

Similar arguments apply to leave granted for political or civic education. In Germany, for example, leave of this type represents a significant proportion of all leave, and in many instances its form and orientation seem to be the subject of active discussion. Perhaps even more important is the future of leave which, to use the distinction made with reservations in Chapter I, is extended rather than restricted. We argued (p. 11) that restricted leave is more tightly bound by the constraints of the internal efficiency of the enterprise, whereas extended

* A specific example from the case studies is relevant here: at the Smederevo metalworks, recent graduates from universities were being squeezed, as the pressure for internal promotion caused posts suitable to their level of qualification to be filled from within.

** See, for example, the remark of a group of independent experts convoked by the European Commission: "There seems to have been a tendency for training within industry to become increasingly specific to the needs of individual firms, while occupational-type skills applicable across industries or sectors have tended to decline in significance in most EEC countries." Outlook for Employment in the European Community to 1980, Brussels 1976, p. 51.

leave could more easily serve other ends. It could, for example, improve the efficiency of the external labour market, in easing the worker's passage from one enterprise or sector to another, and act as an instrument of social justice in changing the conditions of those who are locked into jobs with no prospects of improvement or who are threatened with redundancy. The point to be made here, however, is that there is absolutely no guarantee that extended leave will in fact achieve these ends, unless positive action is taken in that direction by unions, public authorities or such other parties as may have a role.

In short, educational leave, even in its extended form, may well be 'recuperated' as simply another step in the development of vocational training, and this is the more likely as internal labour markets assume increasing importance:* a worker who sees his future as securely fixed within an enterprise, with all the advantages of that security, will be more inclined to accept that training should to a large extent revolve around the company than one who has ideas about moving. The breadth of that training is of course very variable and depends on many factors - indeed a benevolent company may, for whatever reason, be in a position to offer its employees a range of educational opportunities they would have difficulty in improving on in more fluid and open employment circumstances.

Before concluding the direct discussion of segmentation, it is worth making an attempt to set it in a broader context. We have looked mainly at divisions that exist within the active labour force (although we suggested that those outside should also be considered as forming another, third, sector in addition to the primary and secondary sectors) and particularly at the division between internal and external labour markets. There are two further types which compel attention, both types of a centre/periphery division.

The first is the division within any given country in the allocation of different types of production to geographical centres and to the regions. Attempts are now being made, in the name of regional development, to increase at least the quantity of employment available at the periphery, but structural economic factors continue to generate centripetal pressure; even where local employment is maintained in volume terms, the division of labour between centre and periphery tends to get deeper.

The second type is international rather than national. Ironically this issue is often relegated to footnotes or subordinate places in the text, and the scope of this study obliges us to follow this tradition, but we would at least include the reminder that it is not only national labour markets that are segmented. The world labour force can be

* "In the absence of particularly militant trade union organisations, the existence of internal markets would doubtless allow enterprises to organise the essentials of vocational training and access to various jobs." Research into Labour Market Behaviour, op. cit., p. 60.

similarly viewed, with the population of the poorer countries constituting the secondary - or third (unemployed/underemployed) - sector. * No discussion of segmentation would be complete without at least a reference to the consequences of the international division of labour for these countries; just as increased security for one sector of an OECD Member country's workforce may be achieved only at the expense of another sector, so the general improvement of that total workforce's employment situation may have, under present circumstances, severe consequences for a range of other countries.

SECTION 3: QUALITATIVE ASPECTS: TECHNOLOGICAL DEVELOPMENTS, WORK REORGANISATION AND INDUSTRIAL DEMOCRACY

The introduction of technical changes is in part dependent on whether the labour force is prepared for them, in terms both of skills and of attitudes. Obviously, it is pointless to think about investing in new equipment if the employees are not ready to operate it. However, the degree of this dependence varies, in particular according to whether the change is a long-term one or one that is to be implemented quickly. In the short-term, the dependence on available skills is much greater; so that the supply of labour carries greater weight in decisions concerning technological innovation; in the long-term, by contrast, the supply is expected to adapt itself more to the demand, with the requirements of the technological apparatus causing a shift in the skill profile of the labour force.

Yet this schematic representation of the relation between technological innovation is not an immutable process, but depends on the practical feasibility of developing the requisite skills and on the social acceptability of its consequences both for those called on to implement and operate it and for those affected in more indirect ways. **

In the first place, we have already mentioned that technical innovation, whilst resulting in improved working conditions and satisfaction for some, can simultaneously entail a diminution of overall employment and/or a degree of deskilling for others. James Bright, perhaps the

* Of course, there is also segmentation within these degrees, with centres of production (generally performing the refining and finishing functions) contrasting with the periphery (furnishing raw materials).

** "There is a tendency to regard the demand for labour, in aggregate, and by skill and occupation, as given by economic conditions and technological factors ... [however] not all the emphasis in an active manpower policy should be placed on the supply side and its adaptation to changed circumstances." Research into Labour Market Behaviour, op. cit., pp. 95-96.

paterfamilias of skill analysis, made the point very forcefully of how easily and uncritically it can be assumed that technical developments (automation, in his study) bring in their train enhanced skill demands: "During the several years that I spent in field research on managerial problems in so-called automated plants and in exploring automation with industrialists, government personnel, social scientists, and other researchers, I was startled to find that the upgrading effect had not occurred to anywhere near the extent that is often assumed. On the contrary, there was more evidence that automation had reduced the skill requirements of the operating work force, and occasionally of the entire factory force, including the maintenance organisation."* A more recent report by a US task force reiterates the point: "the automation revolution that was to increase the demand for skilled workers (while decreasing the need for humans to do the worst jobs of society) has not occurred," but went on to extend the argument: "it is illusory to believe that technology is opening new high-level jobs that are replacing low-level jobs". **

In other words, technological development can be responsible for a certain polarization, with a very unequal distribution of its benefits among the labour force, between those who profit from the increased skill requirements and concomitant rewards, and those who as a result are denied employment altogether or who are given less opportunity to develop professionally. This is true not only within a given society, but also between societies - and with the most serious harm often being done to developing countries. The polarization process will only take place in some sectors, and in very varying degrees, but its incidence needs to be monitored - and, more importantly, it needs to be regarded as something that can be influenced by decisions taken in a range of economic and social policy areas: those determining the capital/labour price ratio and training provision, for example.

What is the place of educational leave as regards such developments? On the one hand, it can be used as a means of helping the workforce to adapt to the demand for labour, i.e. it can act as an orthodox training instrument to serve economic ends. But - and this is especially important if it is accepted that the merits of some types of technological innovation are, to say the least, debatable - educational

* James R. Bright, The Relationship of Increasing Automation and Skill Requirements, in The National Commission on Technology, Automation and Economic Progress, The Employment Impact of Technological Change, Appendix Vol. II, Washington, 1966, p. 208.

** Work in America, report of a Special Task Force to the Secretary of Health, Education and Welfare, MIT Press, 1974, p. 20. For a striking example of deskilling, see an article in the New York Times of 16th August, 1973, entitled "Restaurant Food: Frozen, Cooked, the Refrozen and Recooked"; a reader had written in to say that his wife had applied for a job with Stouffer's (restaurant) chain, and was told that they didn't need any cooks, only 'thawer-outers'.

leave can be used to allow a greater and more informed participation precisely in decisions that concern the future evolution of technology, with its implication for employment levels, job satisfaction and (even more broadly) the environment. At present, those decisions are taken by a tiny number of people. Often, of course, this is for reasons of straight managerial efficiency, but if the decision-making base is to be broadened then access to information and to the knowledge needed to use that information must be similarly enlarged. This is all the more true if narrow allegiance to a single enterprise, sometimes implied in some of the self-government literature, is to be avoided in favour of a wider sense of social responsibility.

This brings us to wider questions of qualitative changes in work organisation and of industrial democracy, which go well beyond considerations of the impact of technology alone. One should note at this juncture that education may be presumed already to have had a considerable influence in generating pressure for such changes, not so much directly as in that the growth of average education levels have raised aspirations in such a way that there is an increasing, well-documented refusal to accept traditional work patterns.* This is one of a number of factors that have initiated a trend in some countries towards an expansion of the worker's function through job enrichment, job enlargement or job rotation. The first denotes an increase in the 'vertical loading' of a job by allowing the worker more freedom, within the given technological constraints, to choose the methods and sequence of operations - in other words, to increase the challenge of the job in terms of mental and physical skills and responsibility. Job enlargement increases the number of operations the worker has to perform, i.e. it concerns basically physical demands. Job rotation does not affect the operations in themselves, but allows workers to change more often.

We cannot here go into a discussion of these concepts,** but clearly one element common to all three is the need for new skills to be acquired and hence for an expansion of learning opportunities. What is

* See Towards a Policy for Life at Work, IND/MAS/JWP(76)3, p. 30 (OECD, mimeographed document).

** Whilst welcoming their potential for improving the work environment, it is worth making two particular points of reservation. The first is that all three represent an expansion in the worker's job, and this may in certain circumstances therefore mean simply an increased work burden unless it is accompanied by other measures which fit together to constitute an overall improvement in the worker's occupational position.* The second refers back to the split in the labour market: the more some jobs are enriched and enlarged, the less this may leave for others - one man's job enrichment may be another man's redundancy. Here again, therefore, there is the need to judge developments at the micro level in terms of their wider impact.

* Vide the remark of one worker in a recent study: "I don't feel enriched: I just feel knackered", (Theo Nichols, The 'Socialism' of Management, The Sociological Review, May 1975).

more - though the restricted nature of existing evidence makes this a speculative point - just as the growth of internal labour markets, with its emphasis on career development within the company, has encouraged a shift away from the narrow technical and cognitive skills, so these trends towards the expansion of job content, mean that the range of skills to be acquired is broader and not only in the technical sense. It is now recognized, in the field of management training as well as at other levels, that preparation for technical innovation must take full account of the social aspects, both in the design of the hardware and in the training provision.* 'Socio-technical' planning is now the watchwork, though once again it is a phrase which means different things to different people.

Measures such as job enrichment not only encourage learning opportunities and skill acquisition, but may be seen as steps on the road towards a genuinely enlarged participation in the workplace - or, for that matter, in any other social institution. The relevance of educational leave is obvious. In the first place, rights to greater participation given by legislation - or even by negotiated agreements - are likely to remain purely formal if they are not accompanied by the chance to acquire the skills necessary to participate effectively.** For example, disclosure of information about the enterprise's economic activities is unlikely to stimulate much interest if it is present in a fashion rendering it inaccessible to the body of workers; this implies that perhaps the presentation should be changed, but it also means that opportunities to grasp the elements of accounting - or whatever the relevant skill may be - should be readily available.

In the second place, learning and participation reinforce each other. "Experience with such groups | self-managing, e.g. at Alcan, Volvo, or many other sites | suggest that the exercise of greater autonomy is likely to engender group self-confidence and an appetite for further exploration of the possibility for self-management."*** Democratization both encourages learning and is dependent on it - at management level as much as anywhere else. A particularly interesting feature is that the

* See, for example, the statement by Mr. Lars Ødergaard of Norwegian Employers' Federation: "It is quite clear that within many given technological structures only minor changes can be accomplished in the work organisation unless the technological design is changed. Due to the close connection between technology and the social dimensions of work organisations it will be useless to start a process of change based on socio-technical and psychological job-requirements within a technological structure developed on economic and technical criteria alone. What is called for is thus a redesign of the design process itself." Workers' Participation, documents prepared for an international management seminar, OECD, Paris 1975, p. 69.

** See Towards a Policy for Life at Work, op. cit., p. 22.

*** A. Crombie, Post Industrialism and the World of Work, Part IV, Democratization of the Workplace as a Learning Process, Centre for Continuing Education, Australian National University, 1976.

process will often encourage people to teach as well as to learn, and thereby uncover much hidden potential. And the evidence from some of the initiatives taken in this area confirms what we said earlier about the relation of the distinction between vocational and non-vocational education to the occupational hierarchy, for it appears that appetite comes with eating and that workers who begin by being encouraged to extend their directly technical skills are often stimulated to investigate a whole range of field, in order to acquire a fuller comprehension of their occupational (and social) context.

One implication of this - and here we rejoin the question of whether educational leave will predominantly emerge as a form of vocational training - is that the notion of 'job-relatedness' may come to be greatly expanded. If part of a worker's job is to take a more active part in decisions concerning the overall functioning of the enterprise and its place in the social and economic context, the training he needs to perform this job must be correspondingly enlarged. The Italian and Yugoslav case studies come to mind, the former (Bollate hospital) with its curricular emphasis on the notion of health and the consequences for medical institutions and the latter with its direct references to the impact of training on participation. Of course, this is not to suggest that every worker should arrive at the same understanding of all aspects of the enterprise's work; it is simply that, granted the opportunity to participate more widely, he will need to learn how to carry out his functions as they are newly defined. Just as literacy, conventionally understood, can be seen as not only a desirable personal and social attribute but also as essential to the adequate performance of most jobs and hence (like language training for immigrant workers) justifiable under the heading of job-relatedness, so a broader definition of a worker's function entails a broader conception of literacy and likewise justifies its inclusion under the same heading.

As a conclusion to this section, we would refer again to implications for educational leave of the dilemma which is inherent in an extension of workplace democracy: how to reconcile the interests, where they are opposed to each other, of the enterprise and its employees with those of society. In other words, the mere acquisition by workers of a genuinely greater influence in company decisions will not automatically abolish the occasional tension between the individual's role as employee of a certain enterprise and his role as a member of society. A hackneyed but relevant example is a proposal that would make sense economically for the enterprise but would pollute the surrounding environment. In such a decision, the employee may be directly involved on both sides; more testing is the case where the costs of the decision will not be borne by him personally, but by other social groups, or other societies. The implication is that educational leave may be one of the means through which he may become aware of this tension and be less inclined to a short-sighted allegiance to a particular economic unit.

SECTION 4: THE ROLE OF PUBLIC AUTHORITIES

We come finally to the question of what measures the public authorities can most appropriately take to ensure progress towards the social and economic objectives that they adopt. On the one hand, obviously, they can directly provide facilities and finance for educational leave, geared to the specific needs of identifiable industries, population groups or regions. But since the private sector itself already puts an immense amount of effort and resources into training, one cannot ignore the question of what instruments are available, and acceptable, for orienting at least part of this effort in the direction of the objectives referred to above, since it cannot be expected that private provision of training will always qualitatively or quantitatively satisfy public needs.

However, the current record of these instruments' effectiveness is not particularly encouraging. Generalizing, one could say that incentives, direct or indirect, have had an impact which varies from substantial to negative but which averages out at marginal when its side-effects are, as far as is possible, taken into account. A recent report from the EEC, for instance, remarks that "the expansion of public effort has often been too late or too modest in terms of the numbers of training places created and the levels of training given. To date at least, such publicly organised vocational training programmes have not succeeded to a significant extent in developing new outlets for those trained."* Let us take as a more specific example the subsidy to training provided by the 1969 German Labour Promotion Act, designed to increase labour mobility (insufficiently guaranteed by privately financed training) and unblock bottlenecks in the labour market. In 1972, however, the subsidy was cut back, and limited to 1.25 DM per hour per participant (or 1.72 DM for capital-intensive courses). The reasons were as follows: although the subsidy had achieved one of the objectives, the increase of attendance at full-time courses, it had resulted in "an almost uncontrollable upspring of profit-orientated organisations" whose fees were often "excessively high", and also in a reinforcement of the separation between vocational education and general further education, as only institutions which offered the former qualified for the subsidy.** Of course, such defects, one pointed out, can in principle be remedied, but getting the incentive mix right is like caulking a leaky barrel - stop up one gap and the water escapes from another. Declining regions, short-handed industries and disadvantaged groups suffer accordingly.***

* Outlook for Employment in the European Community to 1980, Brussels 1976, p. 53.

** See Recurrent Education in the Federal Republic of Germany, CERI/OECD, 1972.

*** On regional policy, for example, see S. Mukherjee, Governments and Labour Markets, PEP 1976, p. 60: "The effectiveness of incentives is, in the context of all the enterprise decision-making in an economy, quite modest."

But it would be wrong to be too pessimistic concerning the potential of public incentives to the private sector. In the first place, one can reasonably expect a refinement in their application and hence improved effectiveness. But there is a particular reason why the public authorities should take an active interest in the functioning of private sector training. If they restrict themselves to a complementary role, to providing training for those social and economic ends which the private sector appears to be ignoring, there is a clear risk that public sector provision will be seen as concerned with plugging gaps and with those who would not otherwise be regarded as worthwhile training prospects - in short as a remedial service, a position that would tend to reinforce the segmentation of the labour market which we discussed in Section 2.* Whilst, therefore, public authorities may have to be more prepared to deviate from narrow efficiency motives in the provision of their own courses, it would also be reasonable for them to attempt also to deploy their energies in guiding some of the private resources currently expended on training into those areas which will yield a social as well as an economic dividend, and which, even in the latter (economic) areas, will take account of long-term as well as short-term needs.

Most ready to hand are the financial instruments. These include the provision of capital sums, which enterprises (particularly small ones) would find difficulty in raising, for buildings and equipment, whether or not assistance is also given with recurrent expenditure; subsidies through fiscal measures; direct grants either to individual students or for specified educational activities; a levy/grant system; support for research activities. The optimal balance between these constituent elements will be, even more than usual, a matter for each country to assess, in the light of its existing mechanisms and objectives.

Secondly, the proportion of those employed in the public sector has grown considerably over the last few years, even if the exact number is difficult to ascertain. This means that in principle the public authorities can force the pace by demonstrably pursuing a balanced and effective training policy, just as they are in a position to check the inflationary credential spiral through fresh admissions and recruitment policies. There are, of course, both technical and political difficulties, but the size of the publicly employed workforce means that the potential exists for influencing the private sector by competitive example.

Small firms form a special case where public authorities have an obligation to intervene. For reasons discussed elsewhere (Chapter II, Section 2), they are more than average in need of help in meeting administrative overheads incurred in devising and implementing effective training schemes, or alternatively they will be ready to hand over

* See, for example, the following judgement on the skill centres set up under the American MDTA programme: "Most serious of all, the separate centers originally established to serve the disadvantaged become marked over time as another form of segregated institution for the disadvantaged." S. Levitan, G. Mangum and R. Marshall, Human Resources and Labor Markets, Harper and Row, 1972, p. 332.

these functions. The links are also likely to be closer with small firms on the actual provision of courses, which they themselves will be less capable of putting on, and about which they are also likely to lack information.

Indeed, the dissemination of information is a further function that public authorities are best placed to discharge though they will need to be very conscious of the qualitative aspects of the information they provide, given the often justifiable tendency of workers to rely on informal sources (see Chapter III, Section 2). Prospective students, enterprises, institutions providing courses - all need information of various sorts that is often difficult if not impossible for them to acquire on their own.* Such information would include descriptions of available courses, their timing, length and cost; projections, such as those of manpower needs;** evaluations of previous provision; and so on. The diversity of offerings underlines the difficulties involved in the reliable gathering of information and the need for a sizeable public effort in this direction, but it also leads us to another major aspect of the public authority role - the regulatory. For the dissemination of information can also be made on a more explicitly discriminating basis, involving some relatively impartial judgments on the merits of alternative educational offerings, and a publicly constituted and responsible body is an obvious agency for such a task.

The regulatory function extends further, however. Most concretely, there is the issuing of certificates and validation in general, and here the twin concepts of reliability and validity come into play. In order for credentials to possess a reasonable degree of currency, they must represent an assessment which is both reliable, in the sense that another assessment would yield similar results or different assessors would agree, and valid, in that it has measured the right skill or competence. Consistency in both respects needs to be monitored.

Other aspects will be of a more judicial nature. We mention only two, for the sake of example. The first is the supervision of contractual matters, such as the outcomes of negotiations between the social partners on educational leave, the second the adjudication of disputes where such contracts are considered ruptured, or in general where a participant is not satisfied with the educational outcome.

The regulatory function may begin to appear rather institutionalized. But it should not be forgotten that needs and demand can change very rapidly, and it is therefore important that there should be an agency

* It should also be noted that if information is not freely available this tends to have a regressive effect, since the costs of acquiring it fall more heavily on the less well off.

** A particular aspect of this, easily forgotten, is the need to keep abreast on changes in the content of jobs - cf. Research into Labour Market Behaviour, op. cit., p. 112: "The one thing that is certain about an occupational classification of job content is that it should change through time as the job contents themselves change. Frequently the full extent of the change is hidden by the retention of old names and titles."

which is continuously concerned to improve the identification of such needs and demands and to monitor the progress made towards meeting them. In particular, this should involve the regular up-dating of the criteria used to measure such progress and, more broadly, the revision of the standards expected. *

So far we have referred to the public authorities without specifying which specific department should be concerned. Although in many cases the educational authorities appear to play a somewhat restricted role in the implementation of educational leave schemes, there are certain aspects that concern them particularly. Here, however, we deal only with two areas where there is pressure on the public system to adapt itself. The first is the training of teachers, which we discussed in some detail in Chapter III, Section 1. The suggestion there was that teachers inside the public education system could profitably be encouraged to gain outside experience, which would not only expand their orthodox teaching capacity but also put them in a better position to respond to students coming to them under educational leave. The current over-supply (as conventionally understood) of teachers and growing concern about education's relations with the world of work combine with more flexible initiatives in their training to open up the possibility that there will indeed be greater permeability between the teaching force and the enterprises where the majority of their students will find their place.

The second factor is crudely financial. The balance between the budgets of the ministries of education and of those ministries dealing with training and employment have changed dramatically in many countries over the last few years. To some extent this is conjunctural, a feature of the current employment crisis, but there are few signs that employment difficulties will disappear in the immediate future, and moreover the jolt administered to the education system is likely to be remembered. In other words, education systems will experience pressure to adapt if they wish to share in the funds that are now devoted to employment-related education. This is not to suggest any fundamental reorientation of the education system towards narrower economic ends, but at the very least there is room for changes at the margin.

The last aspect of the public authorities' role in determining the extent and character of educational leave refers to an issue that is raised in more and more policy areas: coordination. The dilemma of encouraging individual initiative and complementary pluralism on the one hand, and ensuring that there is neither excessive duplication nor uncontrolled proliferation on the other is one that preoccupies many

* The regulatory function thus described covers two of the roles assigned to government in the document 'Towards a Policy for Life at Work' - the protective (maintenance of standards) and the appraising (the monitoring of trends and the identification of problems); the third role, the promotional, is covered by the rest of this section. See IND/MAS/JWP(76)3, p. 47 (OECD, mimeographed document).

policy-makers, and education and training is no exception. In Section 1 of this chapter we discussed internal coordination of enterprise training policy, and have touched on the topic elsewhere. There are the administrative aspects: how to bring together different responsible departments without creating bureaucratic overload and without involuntarily promoting "committee conflict"; and how to require a reasonable degree of cooperation from those involved without inflicting unnecessary paperwork and other administrative burdens. There is the difficulty of giving a rank order to priorities, which crops up more frequently if an attempt is made to bring policies into concert. There are difficulties of communication, between hierarchical levels, between regions (amongst themselves and with the centre), and between social groups. Finally, there is the difficulty of stopping: policies interlink to such an extent that a rationale can almost always be found for including yet another policy area, and this means that there is often a problem of sufficiently delimiting the field to allow a reasonable prospect of action.

SECTION 5: CONCLUDING COMMENTS

In this chapter we have raised some of the broader issues which the further development of educational leave is likely to encounter. The direction of that development is as yet very uncertain, for all sorts of reasons. It would, however, be at least a reasonable conjecture that as far as the actual expansion of learning opportunities is concerned, movement may be relatively greater in the training and labour market areas (broadly understood), than in the formal education system. This is not to say that the latter will not continue to evolve nor that its evolution should not be given full support, but the present conjunction of strateined economic circumstances and hesitation on precisely what and how much to change in the education system makes a tilt in the balance likely - even if a historical perspective reminds us that such tilts are periodic shifts rather than permanent trends in a single direction.

Whether or not such a shift in resources (budgetary and planning) takes place, it is important that the opportunities that are opened up should be as broad as possible, in the sense both of extending beyond career requirements and of being available to the maximum number of people. Yet on both scores, tensions may arise. As for the former, we warned in Chapter III against a straightforward antithesis between job-relatedness and individual development, but there is no doubt that economic demands and personal inclinations can conflict. As far as the latter is concerned, we argued in Chapter II that efficiency at a micro level may be incompatible with considerations both of equity and

of efficiency at macro level. It is conventional to refer to desired balances as 'delicate'; in these cases they may not be so, but they are unlikely to be any the less hard to achieve.

A particular mention in these concluding remarks is reserved for the needs of workers in the secondary sector of the labour market. Piecemeal and undirected extension of educational leave is unlikely to benefit them very significantly, if unaccompanied by action affecting the demand for labour: in the actual hiring procedures and especially in job creation. * If the tendency towards divergence identified in the labour market is not to be accentuated, such action will become more and more imperative.

On this score, however, a pessimistic note may be sounded in the form of the following hypothesis; that efforts made on behalf of one disadvantaged group are successful only at the expense of another such group or, at best, at the expense of one of the groups relatively little above them in standing. In the case of educational leave, substantiation of this can be easily envisaged: positive discrimination in favour of secondary workers, through training opportunities and through radical changes in the demand for labour in job content and in hiring procedures, may meet with some success, but a probable counterpart would be to depress the relative position of those who were not inside the labour force before the entry ports were reduced - most particularly, youth and women, to say nothing of those in other, poorer, countries. It is an indication of the size of the problem that those last three categories are hardly 'minority' in any quantitative sense.

It is possible, then, to be at least agnostic about the beneficial effects of an extension of educational leave per se. But in any case, how likely is a major expansion? After all, we have reiterated the fact that educational leave is in many cases more or less an outgrowth of vocational training - so is it really plausible to conceive of it as developing very far towards an instrument of individual and collective fulfilment? The only reply we would give is to play the hazardous but often illuminating game of historical parallels, the analogy in this case being very close. The parallel is this: the suggestion of universal paid holidays was greeted with disbelief when it was first mooted - not only impossible, but also unnecessary. Few would now question the right of the worker to a measure of fully paid vacation, or the fact that it is necessary for his or her health and hence in the last analysis, for the community's economic and social well-being. In the same way, the opportunity for each member of the population to maintain and improve his intellectual development and social awareness may come to be recognized as an essential, not a luxury.

* See, for example, Research into Labour Market Behaviour, op. cit., p. 80.

APPENDICES

Appendix 1

LIST OF ENTERPRISES STUDIES

GERMANY

Siemens AG. Munich and Berlin:	fifth ranking in world leading electrical manufacturing enterprises: 207,000 employees in Germany (1974/75).
Bayer AG:	one of the four largest chemical producers in Germany; second ranking in German export industries: 64,370 employees (1975).
Deutsche Bundespost:	one of the largest European service industries and the biggest employer in the German civilian sector: 516,000 employees (1974); 440,000 full-time, 76,000 part-time.

ITALY

Carozzeria Pininfarina, Turin:	car body plant, including assembly line and design of prototypes: 2,067 employees.
Caduti Bollatesi hospital, Milan:	small hospital, growing from a nursing home: 296 employees.

SWEDEN

Post Office, Stockholm:	
Södersjukhuset, Stockholm:	major hospital.
LM-Ericsson, Ostersund:	electronics.
Hedemoraverken, Hedemora:	tool machines.
Stora Kopparberg, Borlänge:	pulp, metal, etc.
Saab-Scania, Södertälje:	cars.

Volvo Kalmarwerken, Kalmar:	cars.
UNITED KINGDOM	
GEC:	largest engineering company in the UK with manufacturing interests ranging from heavy engineering to light domestic appliances: 170,000 employees (all UK employment figures for October 1975).
ICI:	largest single chemical manufacturer in the UK., 132,000 employees.
British Leyland:	publicly owned automobile company: 173,000 employees.
Post Office:	2 of its 4 divisions studied - Telecommunications and Postal Services: total Post Office employees: 420,000.
UNITED STATES	
Kimberly-Clark Corporation:	major paper products manufacturer: 16,000 US employees, 7,000 eligible for educational leave.
Postal Service:	700,000 employees.
Kaiser Permanente Medical Care Services, Northern California:	hospitals, clinics and prepaid medical care insurance plan; privately-owned and operated, non-profit: 11,000 employees.
Kaiser Permanente Medical Care Services, Southern California:	as above: 10,000 employees.
League of Voluntary Hospitals and Homes of New York:	association of 115 privately-owned and operated non-profit hospitals and nursing homes in New York City.
Hospital and Health Care Corporation, New York:	agency operating the public hospitals and health care facilities of New York City.

Metropolitan Nursing Home Association/ Proprietary Hospital Association:	privately-owned and operated profit-making hospitals and nursing homes, 80,000-100,000 union members are covered by paid educational leave agreements in these 3 New York hospital groups.

YUGOSLAVIA

Smederevo Metalworks:	important iron and steel producer: 7,500 employees.
Railway Transport Enterprise, Belgrade:	largest enterprise of its kind in Yugoslavia: 45,000 employees.

Appendix 2

LIST OF RAPPORTEURS

GERMANY	Professor Hans Pornschlegel Sozialakademie Dortmund Hohe Strasse 141 D-4600 Dortmund
ITALY	Mr. Nario Delai Centro Studi Investimenti Sociali (CENSIS) Piazza di Novella 2 00199 Rome
SWEDEN	Professor Thordjörn Stockfelt Samhällsvetenskapliga Fakultäten University of Stockholm Frescati Fiskartorpsvagen 160 Stockholm
UNITED KINGDOM	Ms. Vera Morris Open University, Walton Hall, Milton Keynes
UNITED STATES	Professor Stanley Nollen School of Business Administration Georgetown University Washington DC 20007
YUGOSLAVIA	Professor Stevan Bezdanov Institute for Educational Research Draze Pavlovica 15 Belgrade

Appendix 3

GRID USED BY RAPPORTEURS AS A FRAMEWORK FOR THE CASE STUDIES

Introduction

As its name implies, the notion of recurrent education is based on the principle of alternation between education and periods of work or other activities. In most countries, a certain proportion of the population already have some opportunity to alternate in this fashion, with the educational interlude generally taking the form of vocational training. The recent upsurge of schemes allowing paid educational leave marks a new stage in developments, since in several cases the individual has acquired the right to study rather than his absence from work being wholly conditional upon the agreement of his employer. Of course, this has not meant that the education received is necessarily less vocational in character, since many people are primarily interested in improving their career prospects; what it does mean is that the potential of 'study leave' has been greatly broadened and has become a major component of a recurrent education strategy.

CERI has recently completed, in co-operation with the National Institute of Education in the United States, a survey of educational leave of absence in nine European countries: (Denmark, Italy, Yugoslavia, Netherlands, Belgium, Sweden, United Kingdom, France, Germany and the United States). This survey describes the range of measures that exist, the number and social distribution of the population they reach, and the varying degrees of coherence that they exhibit. One fundamental division, for instance, is between those schemes which give the worker the statutory right to take leave of absence, and those in which the final decision rests with the employer or the public authorities. Again, there are important differences in the types of courses made available, in the degree to which workers are actively encouraged to participate, and in the financial support to which they are entitled.

The study whose outline is sketched below will have a dual purpose. First, it will provide an up-to-date account of measures, implemented in certain Member countries, which facilitate alternation between education and work and an attempt to estimate the incidence of such alternation within the total labour force. Secondly, by analysing in detail the educational opportunities open to those working in a small number of employment areas, and more specifically in a number of selected enterprises. It is proposed that the PTT should be the employment area in the public sector in all the countries; the other employment areas will

depend on the national situation. It will provide an assessment of the way in which such opportunities are provided, the problems they raise, and their relation to overall education and manpower policies. Being based on a common grid of questions, the study should, without being scientifically representative, furnish interesting comparisons both between employment areas - public and private - and between countries. It is a pilot exercise, intended to raise and define issues which may be the subject of a subsequent major study

The Structure of the Study

The study will not confine itself simply to the educational phase in the process of alternation. The departure of the worker from his job to take up his studies, and the way in which he re-enters employment after finishing will also be analysed in detail, in order to give an overall view of the process. Each of these three stages (departure from work, study, return to work) will be looked at from different points of view: those of the individual concerned, of the enterprises* in which he works and to which he returns (whether or not the two are identical) and the relevant public authorities. First the functional arrangements of each stage will be described - for instance, a predominantly empirical account of the processes through which employees go in their application for study. Secondly, there will be an examination of the problems which each of the three agents referred to above (individual, enterprise, public authority) encounter at each stage - for instance, the question of whether the individual, once having gained his study leave, finds the content appropriate to his needs. Thirdly, an attempt will be made to assess the various benefits which accrue, such as a more aware or more skilled workforce, or the improved co-ordination of educational and employment policies.

The Grid

A. The Arrangements

This section will begin with an overall description of the general regulations governing alternation: relevant legislation, collective agreements that have been reached, the system of financing and the relation of the arrangements to other policies. The three stages will then be described separately:

1. Departure from work: how is information about educational opportunities disseminated? What guidance services are available? What are the processes of application to be gone through? Who has the final decision on release, and on what criteria is the decision reached? Are there any elements of positive discrimination built into the

* Enterprise is used in the sense of the place of work: it includes both management and unions, but refers mainly to the former unless otherwise specified.

selection process, and if so in favour of whom? What is the distribution over occupational categories of those who participate? Are social security rights guaranteed?

2. Study period: who offers the courses? Who decides on the content, and how? Who does the teaching, and what specific training do the teachers receive? Where do the courses take place? How long are the courses, full-time or part-time? What percentage lead to a qualification? Are counselling services available during the study period?

3. Return to work: how many return to the same enterprise? Are social rights preserved? Is guidance available for choice of job?

Particular emphasis in this section will be laid on the links which exist with manpower policies and with job creation initiatives.

B. Problems

This section and Section C will depend more on fieldwork on the part of the country reporters in the sense of visiting representative enterprises, interviewing employees and discussing with those responsible for relevant public policies. Some attempt will be made to rank the problems in order of priority, but without undue emphasis on quantatitive aspects.

1. Departure from work:

a) Problems for the individual: does he lack information about his rights and obligations? Is he deterred by the prospect of losing job security? What evidence is there for lack of motivation preventing workers even from considering claiming study leave? Does the enterprise discourage participation, overtly or covertly?

b) Problems for the enterprise: does the outflow of workers cause replacement difficulties, especially for smaller enterprises? How much administrative effort is required? Is there an unfavourable impact on those who do not participate? For instance, does an emphasis on individual promotion impair labour solidarity?

c) Problems for the public authority: how much administrative effort is required? Will excessive demand be stimulated? What is their view on the cost involved?

2. Study period:

a) Problems for the individual: is the content appropriate to his needs, or is it, for example, too subject-bound? Are the teaching methods appropriate, and if not in what ways are they deficient? Do the students feel that lack of formal certification reduces the value of the course? Conversely, do they feel that the courses are certificate-

dominated? Are the arrangements for feedback effective? Are the courses available at the most convenient times and places? Is the balance between vocational and non-vocational content satisfactory? (This question will be the subject of further analysis.)

b) Problems for the enterprise: if the course takes place within the enterprise, what does this involve? Do they prefer to put teachers full-time on the pay-roll or hire outsiders, and why?

c) Problems for the public authorities: if they are responsible for the course, how much of a burden does this constitute? Is it difficult to make available the space or the teachers; is there any sense in which those responsible for the formal system feel challenged by the new clientele?

3. Return to work:

a) Problems for the individual: do his newly acquired skills find suitable application or is he prevented from exercising them? Are there difficulties over the issue of promotion? Are his seniority rights adequately safeguarded? Do changes in work companions pose problems? Are there any implications arising from greater social and economic awareness?

b) Problems for the enterprise: is there unwelcome pressure to alter occupational structures and career patterns? Are they confronted by better-trained union officials or by a more aware and aggressive labour force? In cases where the employee's job is safeguarded on the understanding that he will return, does his greater skill now mean that he may be unwilling to return, with consequent inconvenience for the enterprise?

c) Problems for the public authority: if under an obligation to provide a job for those finishing their studies, can they guarantee job availability? What are the problems posed for manpower planners? Has the extension of opportunity for the employed exacerbated the problems of those outside the labour force, especially women?

C. Benefits

1. Departure from work:

a) For the individual: is there any sign that the act of taking up study stimulates an awareness of the possibility of changing his situation? How many take up study simply as a relief from their present job?

b) For the enterprise: does the departure of employees allow the enterprise to meet less resistance in altering job structures, along the lines of natural wastage? Does the obligation to grant educational opportunities or information re-education provide needed impetus in the enterprise's overall performance?

c) For public authorities: are unavoidable redundancies easier to manage? Does the obligation to widen educational opportunity cause a useful rethink of policy, especially vis-à-vis co-operation with ther authorities?

2. Study period:

a) For the individual: what are the pure consumption benefits? To what extent are new qualifications acquired? Is there any evidence of more general mental stimulation? Is there an improvement in the worker's ability to make decisions - on professional, technical, social or political issues?

b) For the enterprise: is there increased productivity to compensate for the absence of students (or are extra personnel taken on)?

c) For the public authority: what influence does the expansion of educational opportunity have on unemployment rates in the sense of directly reducing the numbers of unemployed? What externalities are discernible, for instance a greater interest on the part of student-parents in their children's education? To what extent is educational plant more fully utilized?

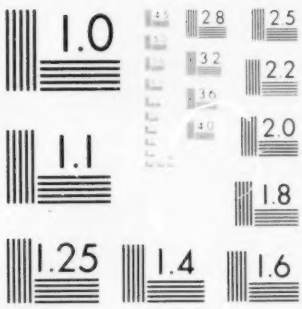
3. Return to work:

a) For the individual: what effect has there been on the wage levels of those who have studied, and on their career patterns? What effect has there been on job satisfaction? What are the greatest benefits recorded for the student's social and non-vocational activities?

b) For the enterprise: how far has the skill level of the workforce been raised, and productivity accordingly? To what extent has the workforce exhibited greater job satisfaction? Has the turnover of staff been reduced? For the unions, has there been an improvement in negotiating ability and in broader ability to influence and participate in decisions?

c) For public authorities: what has been the impact on the formal education system? What is the indirect effect on unemployment, through the improved co-ordination of education, manpower and employment policies? Has there been any benefit for depressed regions?

1-M.L.



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